



EY

Building a better
working world

Regional Municipality of Wood Buffalo P&D Process Review

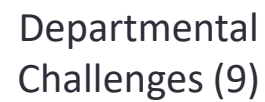
Final Report

22 April 2022

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Below is a visual layout and approach to this report



Departmental Challenges

Identified through a document review and stakeholder engagement, and themed into nine categories for ease of clarity and flow

Business Process	Challenge
Policy	Existing policies have evolved over time without sufficient attention to the impact they have on internal and external stakeholders
External Communications	Customer service information is inconsistent; public development and director-facing pages are difficult to understand and navigate
Forms and Checklists	The website, Land Use Rules and public documents do not include a hyper-link to allow for the general public to understand
Governance	Agendas and checklists are tailored, but are not on the website or if on the website, missing users to understand
Organizational Design	While the structure is made with agility, the process of communicating through change is not formalized, documented and consistent
Information Management	Without sufficient capacity, user clear assignment and sharing of resources, process increased change and hand-off
Technology & Assets	The organization of new and existing assets is inefficient as managers due to limited resources capabilities and staff capacity
Service & Reporting	Existing form, systems and processes have not kept pace with business needs primarily due to time and resource constraints

Addressing existing concerns is important source of proposed improvements that are not being addressed by user self-improvement

[illegible]

1.

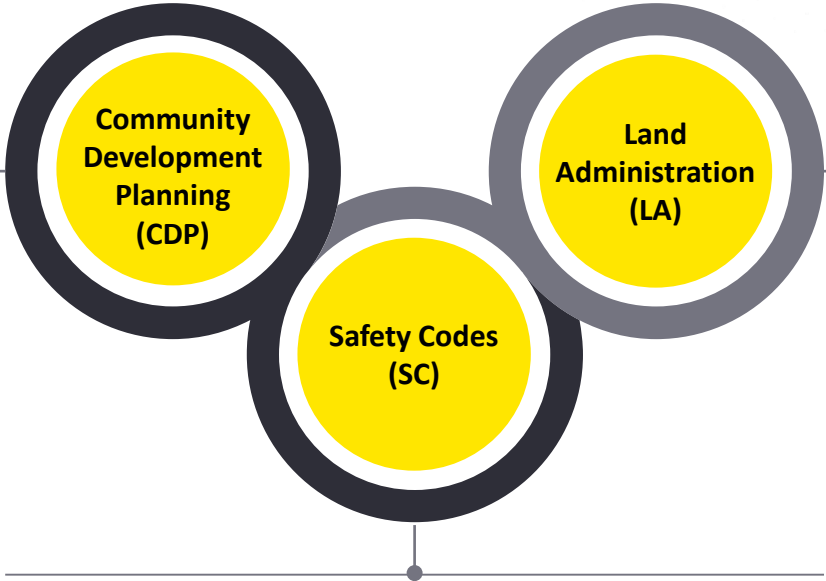
INTRODUCTION

Planning and Development

Departmental Overview

The Planning and Development (P&D) Department within the Regional Municipality of Wood Buffalo is comprised of three branches, each of which provide different public-facing services.

CDP’s most visible role is processing development permits, business licenses and subdivision applications. The branch also undertakes projects that inform and guide our region’s growth, including the Municipal Development Plan, Area Structure Plans, Land Use Bylaw, and Municipal Census.



LA oversees all aspects of acquiring, disposing and leasing of municipal land and facilities in accordance with Alberta’s Municipal Government Act. In addition to the Provincial Land Use Framework, Land Administration is also guided by Federal Government requirements and processes.

SC ensures safe and compliant work that satisfies the requirements set out in the provincially legislated Alberta Safety Codes Act through issuing and closing work permits and inspection services for construction within the RMWB. Safety Codes Officers monitor and identify any nonpermitted sites, identify unsafe work conditions, and ensure permits are obtained and compliance is achieved

Background: Project Context and Objectives

What we set out to achieve from undertaking this project

Why was this project undertaken?

While P&D processes thousands of permits and inspections annually, the department is aware of real and perceived complaints concerning confusion, inefficiencies and miscommunication. As with many regulatory functions, processes administered by P&D are often seen as “getting in the way” and are perceived by the end-user as adding little value. In alignment with the Government of Alberta’s priority of reducing red tape and to support economic recovery, P&D engaged EY to conduct an objective, impartial third-party review of processes

Our objectives are to enhance business processes to:



Improve
customer services



Reduce
red tape



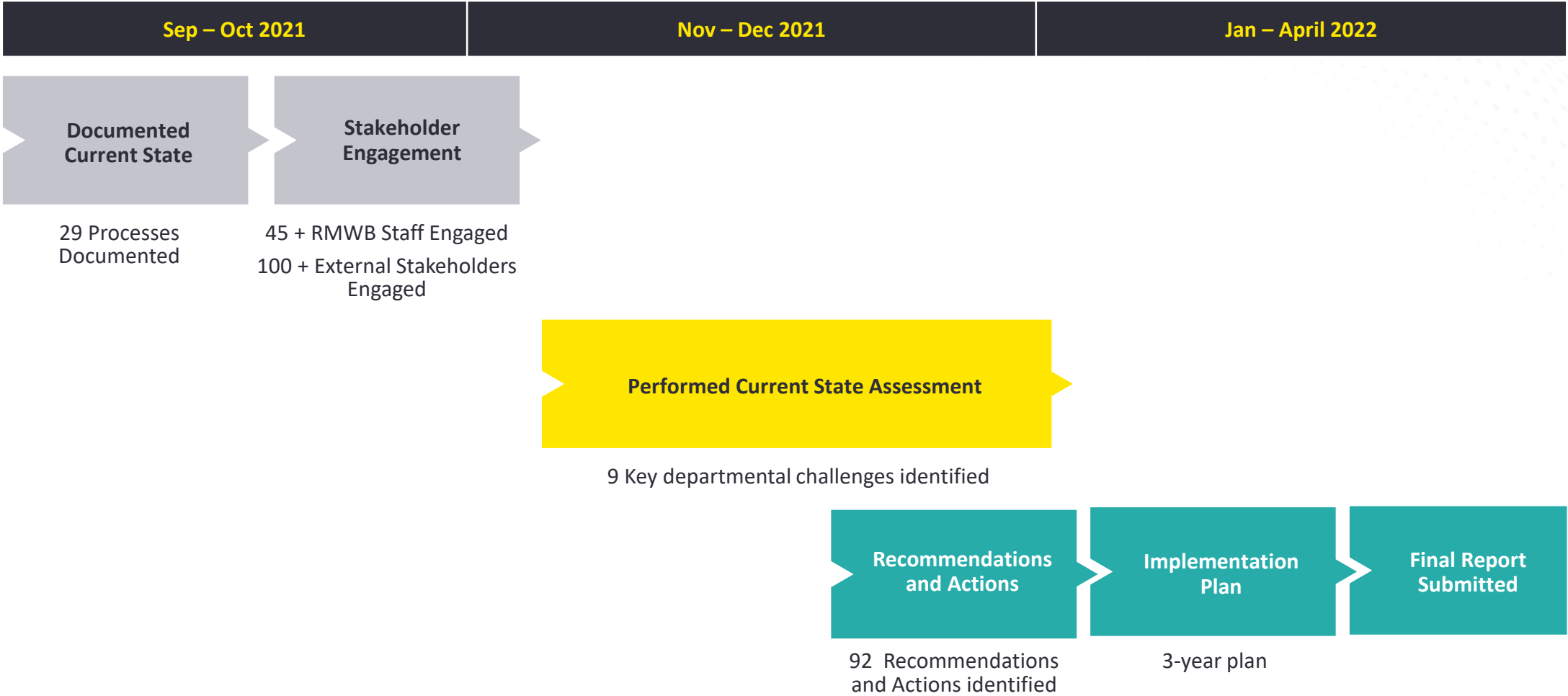
Better facilitate property
improvement, investment and
responsible growth



Reduce barriers
to development

Project Approach

The recommended future state was developed by using this approach



Project Approach – Phase Descriptions

Below is a brief description of the work completed as part of each phase

Phase	Description
Documented Current State	<ul style="list-style-type: none"> Gathered and documented 29 processes across Safety Codes, Land Administration and Community Development Planning, identifying challenges, strengths and opportunities for future improvement Created process flow diagrams for all processes the P&D team currently follows in delivering service, reflecting key steps, roles and responsibilities within the team
Stakeholder Engagement	<ul style="list-style-type: none"> Led a series of internal and external stakeholder workshops, interviews and meetings to understand what processes are working well or as intended; where there are pain-points, gaps, risks or challenges with current processes; and opportunities for improvement, as identified by stakeholders. 45+ internal stakeholders and 100+ external stakeholders were engaged as part of this project The <i>Making Business Easier</i> public survey was launched in November; results and key findings were synthesized into the Current State Assessment
Current State Assessment	<ul style="list-style-type: none"> Identified root issues and detailed observations on the basis of current state processes and stakeholder engagement Defined opportunities with high expected impact and ease of implementation
Recommendations and Actions	<ul style="list-style-type: none"> Key stakeholders were engaged to re-engineer or revise existing business processes to be more streamlined and intuitive; in some cases, this involved the elimination or modification of business process steps Addressed each root issue with a proposed recommendation and implementation plan
Implementation Plan	<ul style="list-style-type: none"> Prioritized and sequenced recommendations Developed a continuous improvement plan to assist P&D in actioning recommendations over the coming months and years
Final Report	<ul style="list-style-type: none"> Delivered a Final Report

Stakeholder Engagement

External and internal stakeholder engagement was foundational to the project

- EY facilitated twenty-eight workshops and interviews with P&D staff and an additional six sessions with other RMWB departments that regularly interact with P&D
- Thirteen workshops with associations, organizations and groups external to RMWB were also conducted to ensure outside perspectives were incorporated

Overview of External Stakeholder Groups Engaged

- RMWB Development Advisory Committee
- McMurray Métis
- Fort McKay Métis Nation
- Northeastern Alberta Aboriginal Business Association
- Fort McMurray Construction Association
- Fort McMurray Chamber of Commerce
- Fort McMurray Real Estate Board
- BILD Wood Buffalo
- Fort McMurray Wood Buffalo Economic Development and Tourism
- Business Stakeholders
- Public (via a survey and targeted follow up to participants who requested it)
- P&D management and staff (45+)
- Other departments within RMWB



2.

EXECUTIVE SUMMARY

Executive Summary

Project at a Glance

 **69**
Documents Reviewed

 **29**
Business Processes Documented


 **100+**
External Stakeholders Engaged

 **45+**
RMWB Staff Engaged

 **3**
Project Goals Identified

 **9**
Key Departmental Challenges Identified

 **92**
Recommendations and Actions

 **Built 3-Year Implementation Plan**

 **15**
Potential KPI's Identified

Project Goals

Recommendations for each department within Planning and Development are set to achieve the following 3 goals



Goal # 1

Be a facilitator of economic activity



Goal # 2

Provide exceptional customer service



Goal # 3

Streamline steps and processes within Planning and Development

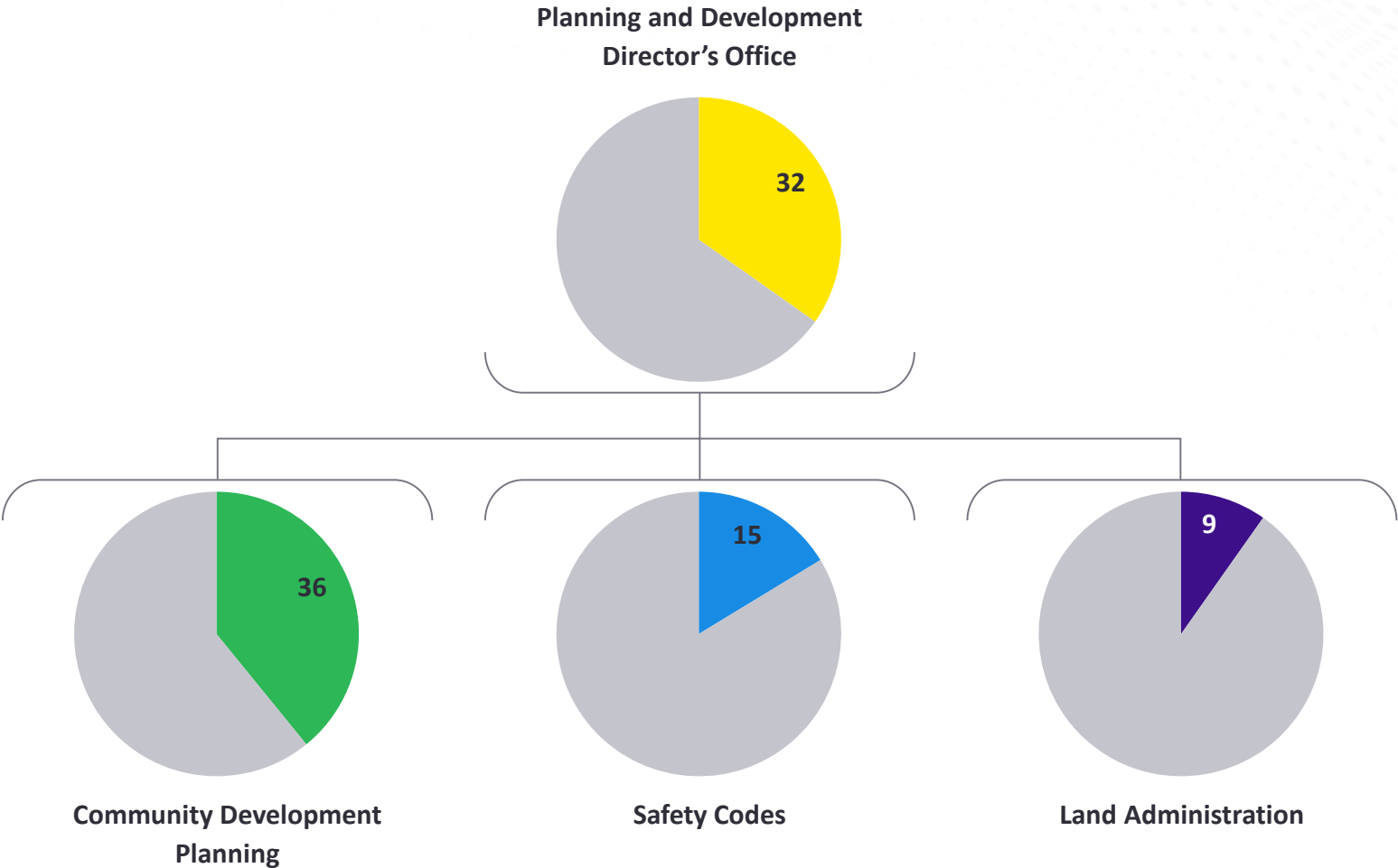
Departmental Challenges

Identified through a document review and stakeholder engagement, and themed into nine categories for ease of clarity and flow



Recommendations and Actions

In response to the 9 key departmental challenges, 92 recommendations were created. From here, a series of actions were identified to fulfill the recommendations. Each Branch within the Planning & Development, along with the Director's Office, have been assigned responsibility to implement the recommendations.



Recommendations - Planning & Development Director's Office

No.	Recommendation
1	Better enable PULSE to qualify and resolve inquiries upstream from P&D
2	Provide written clarification of each stakeholder's authority and reason for inclusion on certain circulations
3	Request IT set up a Call Group for the P&D main phone line and set up an answering machine response
4	Update website and checklists to provide clarity on the term 'accessory structure' to improve understanding on when a development permit is required
5	Develop and implement a knowledge transfer process with onboarding guidance for when a staff member will be away more than two weeks
6	Clearly assign responsibility for enforcement activities when executing special events and enforcing development permit compliance
7	Change the policy, waive the fee or provide a designated procurement card to be used for permit applications related to municipal-led projects
8	Take stock of existing "policy" gaps and bring on a resource to augment their development future development as part of the continuous improvement program (<i>where "policy" in this context can be taken to mean any document used by P&D to guide how services/processes are delivered</i>)
9	Simplify the fee schedule as part of the Land Use Bylaw approval, while also providing guidance on the website
10	Develop a visual overview of P&D processes (services) and how they "fit together" and post this overview on the main "landing" page for Planning & Development
11	Provide an overview of P&D services on the main "landing page" for Planning and Development
12	Embed process information in permit conditions and application submission processes
13	Work with Communications and Engagement to strategize and plan how to deliver messages and updates on P&D process changes to external stakeholders
14	Add a purpose description to the Boulevard Crossing Permit Application form
15	Add a purpose description to the Notice of Appeal application form
16	Eliminate obsolete permit types; group remaining permits by category in E-Permitting and align those groupings to website content and application processes

Recommendations - Planning & Development Director's Office (contd)

No.	Recommendation
17	Review retention and disposition schedule(s) for P&D and use a simple rule of thumb to assign/manage filing duties
18	Establish a Management of Change process that addresses governance for future changes
19	Require rationale, options/solutions (if applicable) and references on Site Inspection Reports and Information Requests by revising the site inspection report template
20	Articulate the mandate and objectives of each branch to bring clarity to differences
21	Engage HR to discuss resource constraints and review RMWB employee retention policies
22	Make strategic, targeted changes to Accela configuration to enforce data quality and consistency by further understanding which fields require their frequent manual clean-up
23	Develop a data strategy that defines how P&D will improve how it acquires, stores, manages, shares and uses data
24	Bring property file information into one information management system
25	Consider investing in configuration changes, while taking a preventative approach
26	Perform software and hardware rationalization assessments to determine if efficiencies can be found
27	Actively manage the circulation lists and action feedback as it is received
28	Enforce a minimum one attachment business rule (as starting point) for all development and building applications submitted through E-Permitting
29	Increase access to Accela data tables to establish live data feeds to canned reports in Power BI (a data visualization tool)
30	Have P&D leadership team agree on priority business goals and underlying performance measures
31	Make targeted improvements to configuration, while exploring procurement of a new permitting solution
32	Make key configurations to OpenText to harness its full potential as a records management system

Recommendations – Community Development Planning Branch

No.	Recommendation
33	Identify the properties impacted by as-built grading certificates issued between 2016-2017 that were not time-bound, proactively notify these owners, and offer a one-year grace period
34	Re-engineer the Development Permit process
35	Re-engineer the Business License process
36	When a Land Use Bylaw amendment is approved, ensure internal documentation and systems are fully updated with notification to P&D staff, and assign clear responsibility for these steps
37	Require approved variances to be linked to the associated development permit in Accela
38	Transition paper booking processes to an online booking and payment app
39	Implement a process for enforcing Business Licenses and pair enforcement with business enablement activities to provide better customer service
40	Formalize management's guidance on Business Licenses
41	Publish in simple terms on the website what is meant by "change of use", why a development permit may be needed and what the exemptions are
42	Educate staff and applicants on minimum requirements for site plans/drawings and refuse ones that do not meet the requirements
43	Identify the multi-tenant buildings that did not previously require unit addresses and proactively notify these owners of the need to correct this, offering a two-year grace period and waiving the application fee
44	Ensure the revised Land Use Bylaw is user friendly
45	Work with the Realtor's Association to develop and publish a home buyer's guidance document on the website
46	Add a purpose description to the Plan Amendment application form and an overview of this service to the RMWB website
47	Add a purpose description to the Civic Address / Legal Description Conversion web page

Recommendations – Community Development Planning Branch (contd)

No.	Recommendation
48	Add a purpose description to the Civic Insight web page
49	Create a Sign Permit Application form with a corresponding purpose description
50	Add a purpose description to the Development Permit Application Form
51	Add a purpose description to the Cannabis Retail Store Development Permit Application Form
52	Add a purpose description to the Development Permit (Rural Area Oil Sands/Pilot Plants) application form
53	Add a purpose description to the Subdivision Application Form
54	Add a purpose description to the Application for Home Business form
55	Add a purpose description to the Compliance Certificate Application Form
56	Add a purpose description to the Variance Application Form
57	Add a purpose description to the Business License Application form
58	Add a purpose description to the Home Occupation Declaration form
59	Add a purpose description to the How to Draw a Site and Floor Plan guide
60	Add a purpose description to the Landscape Inspection Application form
61	Add a purpose description to the Noise Bylaw Letter of Request form
62	Add a purpose description to the Pre-Application Requirements for Development Permit Applications form
63	Add a purpose description to the Special Event Permit Application form

Recommendations – Community Development Planning Branch (contd)

No.	Recommendation
64	Outline on the website and in the application process what documents are required for each type of development permit; improve or create internal checklists used by Clerks to assess completeness of development permit applications
65	Add links to checklists and include definitions within online applications
66	Review circulation periods by development permit type, adjusting where possible, and enforce them more strictly
67	Investigate whether additional functionality can be purchased or added to the existing Civic Insights online tool
68	Consolidate the existing amendments into the current Land Use Bylaw while the new Bylaw moves through approvals

Recommendations – Safety Codes Branch

No.	Recommendation
69	Re-engineer the Occupancy Permit process
70	Offer a separate, standalone process (and workflow) whereby the public can apply (under the Planning tab in Accela) for a consultation with a Planner and Inspector pair who can advise (through an inspection and discussion) of the main considerations an applicant may want to consider under the Land Use Bylaw and Safety Codes Act
71	Formalize management's guidance on Occupancy Permits
72	Add a purpose description to the Building Permits web page
73	Add a purpose description to the Declaration of "Homeowner" for Permit Under the Safety Codes Act form
74	Add a purpose description to the Electrical Permit Application form
75	Add a purpose description to the Annual Electrical Permit Application form
76	Add a purpose description to the Occupancy Permit Application form
77	Add a purpose description to the Gas Permit Application form
78	Add a purpose description to the Gas Appliance Venting Permit Application form
79	Add a purpose description to the Private Sewage Disposal Permit Application form
80	Add a purpose description to the Inspection Requests web page
81	Add a purpose description to the UGS Connection/Disconnection Permit Application form
82	Add a purpose description to the Plumbing Permit Application form
83	Add a purpose description to the Sump Pump to Sanitary Connection Application form

Recommendations – Land Administration Branch

No.	Recommendation
84	Increase public awareness of municipally owned land to discourage misuse. Create a mechanism for notifying P&D of misuse/damage
85	Re-engineer the Land Sales process
86	In third-party agreements, ensure impacted departments are notified prior to contract execution
87	Consider developing an internal policy for the appropriateness of and criteria for the RMWB being a "permanent" or long-term landlord
88	On a case by case basis, evaluate whether or not the outstanding fees need to be paid for any expired encroachment agreements
89	Add a purpose description to the Authorization for Municipal Land form
90	Add purpose descriptions for the following services to the RMWB website: Crossing Agreement, Easement Agreement, Encroachment Agreement, Road Use Agreement, Road Closure Agreement, Third-party Land Consent Agreement, Land Purchase Agreement, Land Sales Agreement, Letter of Authorization and License of Occupation
91	Add a purpose description to the Discharge of Caveat Request Form
92	Develop and implement standardized practices and agreements for high-risk Land Administration activities

Implementation Plan

To help guide prioritization and sequencing

	Year 1							Year 2							Year 3					
P&D Director's Office	1	3	4	7	8	10	11	2	5	6	9	16	17	20	21	13	23	24	27	30
	12	14	15	18	19	25	28	22	26	29	32									
	31																			
Community Development Planning	34	35	41	46	47	48	49	33	36	39	40	42	44	64	67	37	38	43	45	
	50	51	52	53	54	55	56	68												
	57	58	59	60	61	62	63													
	65	66																		
Safety Codes	71	72	73	74	75	76	77	69	70											
	78	79	80	81	82	83														
Land Administration	85	87	88	89	90	91		84	86	92										

3.

GOALS



Goals

Recommendations for each department within Planning and Development are set to achieve the following 3 goals

EY recommends the P&D management team select a handful of these KPIs to implement (a minimum of one per category) and to assign an owner responsible for reporting on these measures

#	KPIs	Provides valuable evidence of:	Current Performance	Target	Frequency of Review	Data Source
Goal #1: Be a facilitator of economic activity						
1.1	# of business license applications submitted	Applications submitted	X#	X#	Monthly	Accela
1.2	# of business license applications approved	Applications approved	X#	X#	Monthly	Accela
1.3	# of building permits requested	Building permits requested	X#	X#	Monthly	Accela
1.4	# of building permits approved	Building permits approved	X#	X#	Monthly	Accela
1.5	# of new builds in RMWB	# of new build in RMWB	X#	X#	Monthly	Accela
1.6	\$ value of building permits	\$ value of building permits	X\$	X\$	Monthly	Accela
1.7	% increase in year over year total number of active business licenses	How easy/difficult it is to obtain a business license and an indicator of business activity	X%	X%	Annually	Accela

Goals

Recommendations for each department within Planning and Development are set to achieve the following 3 goals

#	KPIs	Provides valuable evidence of:	Current Performance	Target	Frequency of Review	Data Source
Goal # 2: Provide exceptional customer service customer service						
2.1	Average number of days between a complete Permit/Business License application being submitted to when the application is approved	How responsive P&D is to all applicants	X days	X days	Monthly	Accela
2.2	Average number of days between a safety code inspection request and when the inspection is performed	How responsive P&D for coordinating inspections	X days	X days	Monthly	Accela
2.3	Number of PULSE inquiries received that relate to P&D services	How effective improvements to the website are	Total #	Total #	Weekly	PULSE
2.4	Number of official updates sent to key “partners” that impact their membership (e.g. FMCA, FMCC, BILD, FMREB, NAABA)	How the process of managing changes through to fruition is performing	#	#	Monthly	Emails from Director
2.5	Number of recommendations actioned and completed, as reported publicly to the Development Advisory Committee	How committed P&D leadership is to driving continuous improvement with transparency	#	#	Monthly	Rec’s Tracker
Goal # 3: Streamline steps and processes within Planning and Development						
3.1	Number of process steps eliminated	To what extent processes have materially been streamlined	N/A	# Permits # Steps	Bi-annually	Process Flows
3.2	Number of processes refined	How effective process changes have been to reduce frustrations and educate applicants	Total #	Total #	Any period	Accela

4.

DEPARTMENTAL CHALLENGES



Departmental Challenges

As a result of documentation review and stakeholder engagement, nine key departmental challenges were identified. All recommendations within this report align to these challenges.

Business Process



Business processes have evolved over time without deliberate attention to the impact they have on internal and external stakeholders

Policy



Customer service intention is overriding policy development and direction causing gaps in knowledge and inconsistent approaches

External Communications



The website, Land Use Bylaw and guidance documentation is highly technical and difficult for the general public to understand

Forms and Checklists



Applications and checklists are tailored, but are not co-located on the website or in E-Permitting, causing users to become “lost”

Governance



While decisions are made with agility, the process of communicating those changes is not formalized, documented and communicated

Organizational Design



Without sufficient capacity and clear assignment and division of responsibilities, there is increased churn and hand-offs

Information Management



The organization of new and existing data is difficult to manage due to limited software capabilities and staff capacity

Technology and Assets



Existing tools, systems and hardware have not kept pace with business needs primarily due to time and resource constraints

Metrics and Reporting



Metrics and reporting remain an important source of process improvements that are not being realized to their full potential







5.

RECOMMENDATIONS AND ACTIONS



How to read report

Definition for each element is provided below

Recommendation No.			Action Items
	Departmental Challenge	One of nine (9) key departmental challenges identified	<ul style="list-style-type: none">• A documented task or activity that needs to take place
	Root Issue	The underlying cause or fundamental essence of some issue, problem, or difficulty at hand	
	Recommendation	A suggestion or proposal as to the best course of action to address the root issue	
	Target Outcome	The expected result after RMWB actions the recommendations and specific action items	
	Responsible	The group responsible for actioning the recommendations and specific actions One of four groups (i.e. Director’s Office, CDP, Safety Codes, Land Administration)	
	Timeline	The timeframe in which the recommendations and actions items are to be completed	

Recommendations and Actions

In response to the **9** key departmental challenges, **94** recommendations were created. From here, a series of actions were identified to fulfil the recommendations. Each Branch within the Planning & Development, along with the Director's Office, have been assigned responsibility to implement the recommendations.










5.1

RECOMMENDATIONS AND ACTIONS

Planning & Development
Director's Office



Recommendations & Actions – Director’s Office







Recommendation No. 01				Action Items	
	Departmental Challenge	Business Process		<ul style="list-style-type: none">• Have PULSE agents request basic information about the inquiry upfront, including requestor name, civic address pertaining to the inquiry, permit/license number (if available), and topic/theme of inquiry• Review PULSE’s guidance sheet used by agents and fill in gaps related to direct questions about property file records requests, sign and event bookings and land admin-related inquiries, and how to obtain compliance certificates• Ensure PULSE agents are advised of any process changes, as recommendations are implemented	
	Root Issue	There is no system in place to triage, prioritize, assign and track requests received via PULSE once received by P&D			
	Recommendation	Better enable PULSE to qualify and resolve inquiries upstream from P&D			
	Target Outcome	Fewer email inquiries and more efficient identification of a file/application owner			
	Responsible	Planning & Development Director’s Office			
	Timeline	Year 1			

Recommendations & Actions – Director’s Office

Recommendation No. 02










Action Items








	Departmental Challenge	Business Process
	Root Issue	Circulations do not specify priority level or relevancy to each reviewer in the context of total workload
	Recommendation	Provide written clarification of each stakeholder’s authority and reason for inclusion on certain circulations
	Target Outcome	A reduction in permit and agreement processing time realized from greater clarity regarding the circulation list
	Responsible	Planning & Development Director’s Office
	Timeline	Year 2

- Conduct an in-depth review of each circulation list in use by each branch of P&D to re-affirm why a stakeholder group or entity would or may be included on a particular application or agreement circulation
- Meet with the department or team leader from each entity, as required, to confirm which applications they should receive, why, what they look for/review and what their authority is under relevant legislation (i.e., whether P&D is seeking approval from a stakeholder or simply creating awareness through a circulation to them)
- Document the business and legal rationale for their inclusion on a particular circulation and change the circulation list to not have just ‘X’s’, but instead specify if the stakeholder is an Approver or not (i.e., whether P&D can proceed if they do not hear back within the stated circulation period and accept non-response as consent)
- Include this detailed information and rationale underneath each circulation list, so staff have clear guidance they can refer to for future applications and know the business reason for why they are circulating something to a particular stakeholder/entity

Recommendations & Actions – Director’s Office

Recommendation No. 03				Action Items
	Departmental Challenge	Business Process		<ul style="list-style-type: none">• The main phone line for P&D (being 780-799-8695, as indicated on all application forms), could be set up in Microsoft (assuming a VOIP system currently exists at RMWB) to forward calls to a Call group, which can include up to 25 staff according to Microsoft Support; this would enable more than one person to answer calls• Also, P&D could inquire with IT about setting up an answering machine for this number which could be monitored by a staff and allow for staff/public to leave inquiries until they can be called back
	Root Issue	There is only one phone line for permit inquiries		
	Recommendation	Request IT set up a Call Group for the P&D main phone line and set up an answering machine response		
	Target Outcome	This would improve customer service and reduce the volume of email inquiries		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 1		

Recommendations & Actions – Director’s Office

Recommendation No. 04				Action Items	
	Departmental Challenge	Business Process		<ul style="list-style-type: none">As the term “Accessory Structure” is not well understood, post onto the website a list of building types that fall under the “Accessory Structure” categoryAdd a note on the Accessory Structure checklist clearly stating that development permits for accessory structures under 10x10 feet do not require a development permit (e.g. sheds)	
	Root Issue	The term ‘accessory structure’ is not universally understood			
	Recommendation	Update website and checklists to provide clarity on the term ‘accessory structure’ to improve understanding on when a development permit is required			
	Target Outcome	Improved understanding of the term ‘accessory structure’			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 1			

Recommendations & Actions – Director’s Office

Recommendation No. 05



Action Items

	Departmental Challenge	Business Process
	Root Issue	There is no established knowledge transfer process in place
	Recommendation	Develop and implement a knowledge transfer process with onboarding guidance for when a staff member will be away more than two weeks
	Target Outcome	Improved customer service and reduction in application processing time
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

- Define when knowledge transfer is required, which would be recommended when a staff member assigned to review or process an application will be away for two or more weeks (such as for vacation, parental leave, etc.) or are no longer in their current role (e.g. due to a transfer, departure or retirement)
- Develop a checklist for knowledge transfer for staff to use when this scenario is triggered, which would include activities such as:
 - Initiating the knowledge transfer process far enough in advance of leaving
 - Determining who will assume **and progress** the file in their absence
 - Ensuring the most recent action on the file has been documented and what the next, immediate action or two required is while in their absence (either by them or the applicant)
 - Sharing that file/application information with the person covering in their absence or assuming their work indefinitely and **being available to answer any questions before leaving**
 - **Notifying** the applicant, not only through an out-of-office auto reply message, but via email or phone depending on the nature of the file/application (consider complexity, sensitivity and expected level of activity on the file following the person's absence)
- If the staff is returning after a period, **conduct** this process again to bring the returning staff up to speed, so the applicant is not frustrated by needing to repeat steps or discussions

Recommendations & Actions – Director's Office

Recommendation No. 06



	Departmental Challenge	Business Process
	Root Issue	Enforcement processes are not an area of focus or working as intended
	Recommendation	Clearly assign responsibility for enforcement activities when executing special events and enforcing development permit compliance
	Target Outcome	Reduced liability to RMWB of financial losses and improved safety in the community
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

Action Items

Enforcing special events on municipal land:

- Have P&D management meet with the team responsible for bylaw enforcement services (which has been moved outside of the Department and includes Bylaw Officers) and discuss the desired approach to enforcing special events on municipal land
- Consistently utilize a standard contract (reviewed by Legal Services) that describes the responsibility of the applicant and RMWB (include terms that address who is responsible for cleaning the site, ensuring site infrastructure is returned to the same/better state than before the event, to whose satisfaction these terms will be enforced by and within what timeframes (ensure alignment with Parks)
- This contractual agreement may be drafted in such a way that makes any and all damages occurred, to either a municipal property or to a municipal asset, the responsibility of the applicant
- Following the event, a Bylaw Officer could be assigned to assess the property within 12 hours of the special event's end time and report back to planning and development; for certain events, a Bylaw Officer may need to work in tandem with other RMWB employees who have skill sets better suited to assess the damage of a particular event (e.g., a Park Supervisor)
- Implementation of a practice of accepting security damage deposits for events over a determined size or dollar threshold could also be used to incentivize compliance with contract terms
- All requirements for a special event permit (including a formal agreement of responsibility and a security deposit) should be listed on the standalone event permit web page

Enforcing development permit compliance:

- Have the person assigned to own enforcement processes within P&D provide a periodic report of active, high risk developments (determined based on an objective criteria) with a randomly selected number of sites for the Supervisor, Field Inspections to work into their schedule, where possible (or with the help of the Scheduling Clerks)
- Where a Bylaw Officer or Fire Inspector identifies what appears to be an unsafe or non-compl

Recommendations & Actions – Director’s Office

Recommendation No. 07



Action Items

	Departmental Challenge	Policy
	Root Issue	Internal departments are not authorized to pay for permit applications using their procurement cards
	Recommendation	Change the policy, waive the fee or provide a designated procurement card to be used for permit applications related to municipal-led projects
	Target Outcome	Minimize barriers and delays to municipality-led construction projects
	Responsible	Planning & Development Director's Office
	Timeline	Year 1

- Investigate with Finance why procurement cards cannot be used to pay for permit applications; if it is a matter of tracking inter-departmental expenditures, have these expenses categorized and flagged appropriately when staff submit their expense reports to Finance for approval or dedicate one specific P-card for use by all staff ONLY for the purposes of submitting permit applications
- If the Policy cannot be over-come, investigate how Clerks currently “waive fees” under certain circumstances (such as by manually advancing a workflow or issuing) and seek approval to take that approach going forward

Recommendations & Actions – Director’s Office

Recommendation No. 08



Action Items

	Departmental Challenge	Policy
	Root Issue	Insufficient resources exist to drive effective policy development and implementation
	Recommendation	<p>Take stock of existing “policy” gaps and bring on a resource to augment their future development as part of the continuous improvement program</p> <p>(where “policy” in this context can be taken to mean any document used by P&D to guide how services/processes are delivered)</p>
	Target Outcome	Clearer management guidance, updated SOPs and business effectiveness
	Responsible	Planning & Development Director's Office
	Timeline	Year 1







- Organize all bylaws, policies/management guidance, standard operating procedures, and business process maps relevant to P&D into the shared drive in a location accessible to all P&D staff
- Create an Excel inventory of these documents, noting which role within P&D is the knowledge owner/subject matter expert of the document’s topic matter (or assigning one), when the document was last reviewed, and who the approver is of any changes to the document
- Consider the “policy” hierarchy of approvers for these knowledge assets:
 - For Bylaws, it may be Council
 - For department-specific policies/management directives, it may be the Director, P&D
 - For Standard Operating Procedures (SOPs), it would be the respective Branch Manager
 - For business processes, it would be the Process Owner
- Identify where there are gaps in this hierarchy for key functions/services delivered by P&D
- Consider hiring a summer student to work as a policy analyst in researching and drafting this content
- When policies are formally approved, track the approval and issue communications to impacted stakeholders at the appropriate levels within the organization

Recommendations & Actions – Director’s Office

Recommendation No. 09



Action Items







	Departmental Challenge	Policy
	Root Issue	The fee schedule is highly complex and inflexible
	Recommendation	Simplify the fee schedule as part of the Land Use Bylaw approval, while also providing guidance on the website
	Target Outcome	Better understanding by stakeholders of the current fee schedule leading to fewer refunds issued from inaccurate applications, resulting in a better customer experience
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

- Given the desire to understand fees upfront and in advance of application submission (without needing to book a pre-application meeting), there is value in approving a new, more simplified fee schedule (e.g. fewer fee categories)
- The simplified fee schedule which was developed in 2021 should be revisited at the same time the new, work-in-progress Land Use Bylaw is brought to Council
- Two fee schedule changes currently proposed for implementation which would improve the schedule is the elimination of the file search fee and latitude to pro-rate annual sign permit fees
- In the interim, on each Development and Building Permit type page of the website, fee guidance (which in some cases depends on calculations by square footage) should be included, which will help residents, business and developers anticipate costs

Recommendations & Actions – Director’s Office

Recommendation No. 10



	Departmental Challenge	External Communications
	Root Issue	The fee schedule is highly complex and inflexible
	Recommendation	Simplify the fee schedule as part of the Land Use Bylaw approval, while also providing guidance on the website
	Target Outcome	Better understanding by stakeholders of the current fee schedule leading to fewer refunds issued from inaccurate applications, resulting in a better customer experience
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

Action Items

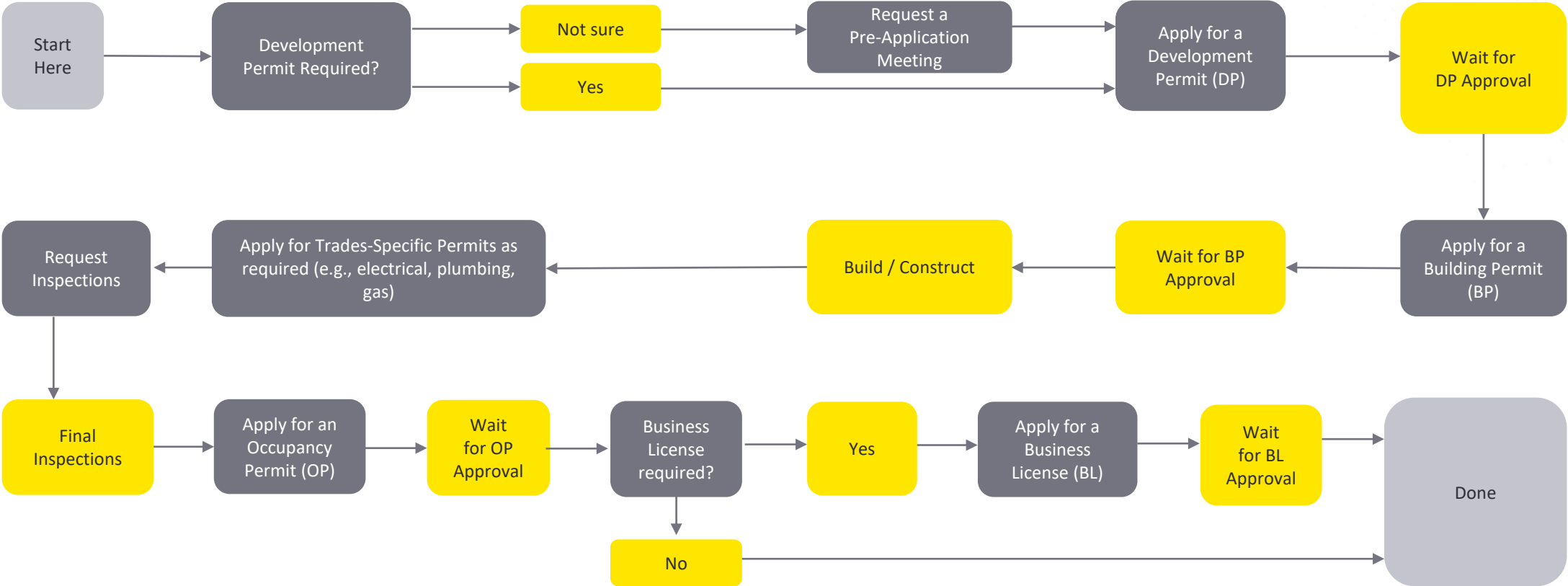
- Create a visual overview, simple enough to show in one frame, of core processes and what services an applicant may typically encounter, such as:
 - First learn about what types of activities require a permit (i.e. their starting point in the process) by reviewing content on the website; if they are unsure, they can book a pre-application meeting
 - From there, they may apply for a Development Permit to confirm what they plan to do to their property will conform with the rules set out under the Land Use Bylaw
 - Once their Development Permit application is approved, they may apply for a Building Permit
 - Once the Building Permit is approved, they can begin to build based on their plans and request inspections at key points in the building process to ensure the structure meets the Safety Code Act
 - During the building process, certain Trades-specific Permits may be needed, which require specialized knowledge, such as electrical, plumbing or gas for example; work related to each trade will require the applicant submit a permit
 - When the building process is near completion and all trades-specific permits are closed, the applicant will apply for partial, conditional or full Occupancy Permit
 - The applicant will then call to book a final building and occupancy inspection, which if approved (and for full Occupancy Permit), will close the Building Permit and result in the issuance of an Occupancy Permit
 - If an applicant plans to operate a business on the property, they can apply for a business license once the Occupancy Permit is received; the business license will need to be renewed over time
- Post this overview on the main “landing” page for Planning and Development; consider making the visual overview interactive and clickable to corresponding web pages

Sample visual overview of a typical “end to end” process map

SAMPLE

Please note the below map is intended to serve as a sample to help the RMWB visualize recommendation EC-1; additional steps and decision points may be required to ensure accuracy

Legend
■ Clickable Web Page



Recommendations & Actions – Director’s Office

Recommendation No. 11

Departmental Challenge

External Communications

Root Issue

The mandate and services offered by each department are not clearly specified on the website

Recommendation

Provide an overview of P&D services on the main “landing page” for Planning and Development

Target Outcome

Fewer inquiries about P&D services and improved customer experience

Responsible

Planning & Development Director's Office

Timeline

Year 1








Action Items

- Provide an overview of the services offered by the Planning & Development department that connects existing pages and recommended new pages (such as the Development Permit Types page previously described); bring the general content orphaned here to the new main page
- Specifically ensure P&D services that are not currently described anywhere on the website are noted and linked from the main page, such as property file records searches and submission of applications for compliance certificates or variances
- Below is an overview of services which can be used to inform a website design

Overview of P&D Services Offered					
1. Learn	2. Plan	3. Build	4. Occupy	5. Operate	6. Maintain
<ul style="list-style-type: none">• View the Land Use Bylaw• Request a Bylaw or Plan Amendment• Appeal a Decision• Explore Development Activity• Access the Municipal Land Inventory• Request Property Records• Book Municipal Advertising Space• Book Municipal Event Space	<ul style="list-style-type: none">• Apply for a Development Permit• Inquire about a Change of Use Exemption	<ul style="list-style-type: none">• Apply for a Building Permit• Apply for a Trades-specific Permit• Apply for a Water Meter Permit• Request to Book an Inspection	<ul style="list-style-type: none">• Apply for an Occupancy Permit (partial, conditional or full)	<ul style="list-style-type: none">• Apply for a Business License• Renew a Business License	<ul style="list-style-type: none">• Request a Compliance Certificate• Apply for a Variance• Understand How Enforcement Works

- There would also be value in adding PULSE contact information on each webpage P&D is an “owner” of
- Remove direct department or team contact information from website pages where it exists and replace or add contact information for PULSE as well as guidance on what to note as the topic of the inquiry (e.g. if the webpage content relates to property file records search, recommend that be indicated as the topic of their inquiry for a faster response and resolution time)
- Also provide PULSE with guidance on what the general process is, so they are better equipped to answer questions







Recommendations & Actions – Director’s Office

Recommendation No. 12				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none"> Following the submission of a permit application (of any kind) in E-Permitting, configure an on-screen notification or add it to the system generated email (that is sent to the applicant) that they must wait for approval before proceeding to develop or build Add a processing timeline to the standalone web page for each category of Development Permit and Safety Codes permit <ul style="list-style-type: none"> Development Permit categories: Residential (single submission), Residential, Commercial, Industrial, Institutional, Demolition, Sign, Special Event (Private Land), Variance, and Subdivision (includes Condominium, Development Agreement and Subdivision) Safety Codes permit categories: Building Permits, Electrical, Gas, Gas Appliance Vent, Electrical (includes Annual Electrical Permit), Plumbing, Private Sewage, Service Connection and Occupancy Permit 	
	Root Issue	At the time of permit application submission and fee payment, applicants are not reminded they must wait for approval			
	Recommendation	Embed process information in permit conditions and application submission processes			
	Target Outcome	Fewer “abandoned” permit applications, reduced backlog and increased compliance			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 1			

Recommendations & Actions – Director’s Office

Recommendation No. 13











	Departmental Challenge	External Communications
	Root Issue	There is an absence of a communications strategy and plan for driving key messages and change external to P&D
	Recommendation	Work with Communications and Engagement to strategize and plan how to deliver messages and updates on P&D process changes to external stakeholders
	Target Outcome	Build stakeholder awareness of process changes and their confidence in P&D’s ability to deliver better customer service.
	Responsible	Planning & Development Director's Office
	Timeline	Year 3









Action Items

- Hold a joint planning session with P&D and Communications to strategize and plan how key changes implemented by this project will be disseminated to external stakeholder groups identified and analyzed in the Stakeholder Engagement and Communications Plan
- Consider one or more of the following tactics and channels when compiling that plan:
 - A monthly email update from the Director of Planning & Development or quarterly newsletter distributed to key external stakeholders groups such as: FMREB / Real Estate Agencies, the Chamber of Commerce, NAABA, BILD Wood Buffalo, FMWBEDT, FMCA, FMCC, and Indigenous Communities such as McMurray Métis
 - A monthly educational series led by staff to educate colleagues on important policies, business processes, or procedures; require sign off on the presentation by management
 - Provide approved updates to Communications for incorporation into existing communications calendars for social media and other municipality controlled channels
 - Consider a virtual open house format, that provides not only a presentation of key changes, but possibly also: a virtual fireside chat (where a host asks questions to staff from different roles in P&D or from the different branches to speak to certain changes in a casual format), a how-to animated video is shared (e.g. such as on how to submit a site plan) as a preview of more videos to come, break-out sessions on key topics are offered, and collateral provided
- Ensure the plan includes feedback mechanisms that can be sustained over time

Recommendations & Actions – Director’s Office

Recommendation No. 14				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Boulevard Crossing Permit Application form (e.g. Seek approval to use, develop or build a structure on a municipality owned boulevard)Consider adding the following information to the application form: a description of the permit and when an applicant is required to apply
	Root Issue	The application process for a Boulevard Crossing Permit Application is not universally understood		
	Recommendation	Add a purpose description to the Boulevard Crossing Permit Application form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 1		
	Checklist Currently Exists?	No		







Recommendations & Actions – Director’s Office

Recommendation No. 15				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Notice of Appeal application form (e.g. An application used to file an appeal to the Subdivision and Development Appeal Board)On the Permitting and Resources page, the Notice of Appeal application presently links to the pre-application requirements for development permits schedule; modify this such that the Notice of Appeal application links to the appeals application	
	Root Issue	The process for a Notice of Appeal application is not universally understood			
	Recommendation	Add a purpose description to the Notice of Appeal application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 1			
	Checklist Currently Exists?	N/A			

Recommendations & Actions – Director’s Office

Recommendation No. 16



	Departmental Challenge	Forms and Checklists
	Root Issue	The permit “pick-list” in E-permitting is lengthy, outdated and does not clearly map to a set of permit types on the website
	Recommendation	Eliminate obsolete permit types; group remaining permits by category in E-Permitting and align those groupings to website content and application processes
	Target Outcome	Permit applicants can easily read about what permit they require and why on the website and intuitively find and apply for that permit in E-Permitting
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

Action Items

- Work with the Development Permit and Building Permit process owners to review the Accela development permit pick-list (under Planning/Engineering tab) and Safety Codes permit pick-list (under the Building tab) to eliminate permits no longer in use or not understood and group them in a more intuitive manner, as opposed to alphabetically; engage with key external stakeholders for feedback on any proposed new changes
- More specifically, for Development Permit types:
 - Group types by the following categories: Residential (single submission), Residential, Commercial, Industrial, Institutional, Demolition, Sign, Special Event (Private Land), Variance, and Subdivision (includes Condominium, Development Agreement and Subdivision); explain the categories where needed
 - Move the Water Meter Permit to the Building tab
 - Delete the “Shared Occupancy with Existing Business” and “Visiting Students Supervised Housing Unit” development permits that are not used
- More specifically, for Safety Code Permit types:
 - Group types by the following categories: Building Permits, Electrical, Gas, Gas Appliance Vent, Electrical (includes Annual Electrical Permit), Plumbing, Private Sewage, Service Connection and Occupancy Permit
- Follow this up by re-organizing the content on the website: from the Development and Planning main “landing page”, refer people to a specific Development Permit types page (similar to the Safety Codes permit page) which has buttons for each category of Development Permit with a description of what each underlying permit type is, its purpose (include citing any relevant legislation), when it is needed and its requirements; and put checklists and any guidance documentation with each permit type
- Add a button for Service Connection on the Safety Codes permit page, fix the description of the Occupancy Permit (and describe partial, conditional and temporary occupancy) and ensure all these permit types have the same structured description as described for Development Permits above

Recommendations & Actions – Director’s Office

Recommendation No. 17










	Departmental Challenge	Governance
	Root Issue	Information management protocols and responsibilities are unclear across CDP and SC
	Recommendation	Review retention and disposition schedule(s) for P&D and use a simple rule of thumb to assign/manage filing duties
	Target Outcome	Staff understand information management protocols and their related duties
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

Action Items

- Obtain the latest retention and disposition schedule applicable to P&D and its information assets (e.g., development permit approvals, agreements, compliance certificates, maps, file correspondence) and review it with staff to understand how long certain documents need to be kept before they are archived or destroyed
- Provide a definition of what constitutes transitory documentation (note: typically this includes documents of no historical, financial, legal or business value, such as copies of documents or certain types of correspondence), which should be destroyed/deleted on an ongoing basis
- Using the business process flows as reference material, consider a simple rule of thumb for assigning responsibility:
 - For filing information assets: the individual who is the “owner” of a file or primary role delivering the core analysis (such as the Planner reviewing a development permit or Building Safety Codes Officer reviewing a deck application)
 - For checking information assets are filed: the person who performs the last step in the process, often for the purposes of closing the file and associated workflow (such as the CDP Permitting & Licensing Clerk closing a business license file or a SC Permitting & Licensing Clerk closing an occupancy permit file)
 - For any other staff assigned to support or provide direction on a file, communicate that the responsibility for filing related assets remains with the primary role delivering the core analysis, but the accountability for ensuring it gets done, rests with the supervisor/manager
- If the above rule of thumb is adopted, Supervisors and Managers not assigned as the “owner” of a file would need to periodically request feedback from those assigned to check information assets have been filed to confirm these duties are being satisfactorily fulfilled

Recommendations & Actions – Director’s Office

Recommendation No. 18				Action Items
	Departmental Challenge	Governance		<p>Note: For additional details on how the management of change process can work, please see the Continuous improvement plan - Process of managing change (Section 6)</p> <ul style="list-style-type: none">• A Management of Change (MOC) policy or procedure would outline a systematic approach to considering and approving process changes and help ensure effective control and governance is in place.• All proposed process changes would be reviewed and approved by appropriate levels of management• In addition delivering messages and updates on P&D process changes to external stakeholders, an MOC process would give structure to identifying internal and external stakeholders impacted by approved changes and communicating updates in a timely manner
	Root Issue	There is no governance mechanism to prevent “organic” changes to business processes and formalize changes		
	Recommendation	Establish a Management of Change process that addresses governance for future changes		
	Target Outcome	Fewer "organic" and more formalized changes to business processes and hence increased compliance to said processes		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 1		

Recommendations & Actions – Director's Office

Recommendation No. 19



	Departmental Challenge	Organizational Design
	Root Issue	Communication of a decision rationale and actions required is not a formal responsibility of all front-line roles
	Recommendation	Require rationale, options/solutions (if applicable) and references on Site Inspection Reports and Information Requests by revising the site inspection report template
	Target Outcome	Improved customer service and satisfaction levels
	Responsible	Planning & Development Director's Office
	Timeline	Year 1

Action Items








Related to the Inspections Process:

- Increase consistency among Inspectors (e.g. "true or fact" vs. "interpreted or opinion" code) by revising the Site Inspection Report template to include fields that Inspectors are required to populate, which include decision rationale, applicable specific sections of the Code, options/alternative approaches for consideration to address the deficiency, and a checkbox with a comment line acknowledging the cost (order of magnitude only and not actual dollar value)
- Have Legal review these revisions to ensure liability is not being introduced through template revisions
- Improve communication and transparency with applicants around inspector availability and scheduling
- Implement a complaint or escalation mechanism for applicants not understanding or disagreeing with an inspection finding
- Consider implementing a policy that requires consistency in the Safety Codes officer assigned to perform follow-up inspections on a single permit application








Related to the Permitting Process for both Community Development Planning and Safety Codes:

- Implement a standard practice of only sending information requests that include rationale for why the information is needed (i.e. to address a specific requirement) and why it is being asked for at that particular stage in the process








Recommendations & Actions – Director’s Office

Recommendation No. 20				Action Items
	Departmental Challenge	Organizational Design		<ul style="list-style-type: none">• In alignment with the SOPs, develop a strategy for Land Sale processes involving commercial and industrial land• Articulate the mandate of each branch on the website, ensuring any current definitions used are refreshed and titled (e.g. the Safety Codes Mandate here, the Community Development Planning Mandate could be put here, and the Land Administration mandate could be added to the description here, as in most jurisdictions, Land Admin does not ‘advertise’ its services, as it is used more as an enabling function to customer-facing services)
	Root Issue	Community Development Planning and Land Administration’s mandates are inherently in conflict		
	Recommendation	Articulate the mandate and objectives of each branch to bring clarity to differences		
	Target Outcome	Improved communication, coordination and understanding of the objectives and framework by which each branch operates within, which will translate to better customer service		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 2		

Recommendations & Actions – Director’s Office

Recommendation No. 21				Action Items
	Departmental Challenge	Organizational Design		<ul style="list-style-type: none">Working with HR as business partner in tackling these issues may help identify systemic or root causes and provide insight or a business approach to improving resourcing concerns and constraints
	Root Issue	Resourcing constraints exist and it is difficult to fill vacant positions		
	Recommendation	Engage HR to discuss resource constraints and review RMWB employee retention policies		
	Target Outcome	Fewer resource constraints and improved employee retention		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 2		

Recommendations & Actions – Director’s Office

Recommendation No. 22				Action Items	
	Departmental Challenge	Information Management		<ul style="list-style-type: none">• Discuss with Clerks from CDP and Safety Codes which application fields frequently require their intervention for manual clean up and re-formatting; provide this list, in priority order, to the Accela consultant to investigate if these fields can be re-designed (for go-forward workflows) to enforce a desired data format and what the effort estimate would be to make these improvements• Weigh the cost and value of implementing configuration improvements (i.e., productivity gains) to determine which changes are worth making	
	Root Issue	Accela does not effectively enforce quality and integrity of data entered			
	Recommendation	Make strategic, targeted changes to Accela configuration to enforce data quality and consistency by further understanding which fields require their frequent manual clean-up			
	Target Outcome	Less time spent by Clerks manually cleansing data to achieve consistent formats			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 2			

Recommendations & Actions – Director’s Office

Recommendation No. 23



Action Items







	Departmental Challenge	Information Management
	Root Issue	Lack of a data strategy driving quality, availability, accessibility and usability of data
	Recommendation	Develop a data strategy that defines how P&D will improve how it acquires, stores, manages, shares and uses data
	Target Outcome	A clear understanding of how P&D can get the most out of its data assets, especially for reporting on performance measures for continuous improvement purposes
	Responsible	Planning & Development Director's Office
	Timeline	Year 3

- For P&D to enhance its reporting capabilities, the development of a data strategy will be a valuable pre-requisite, as it will define:
 - What data does P&D acquire? – E.g. construction value (of development permits)
 - Where does P&D store its data? – E.g. in Accela data tables/data bases, a Property File in the Shared Drive, in offsite storage, in paper files onsite, or OpenText file repository
 - How is data provisioned? – E.g. Is it a request to IT for a system export? Or live data feed to Power BI? Or request for records from offsite storage?
 - Once provisioned, how is this data transformed and cleansed into a “ready to use” format?
 - How is data governed using information management policies and usage agreements?
- It is recommended the CDP Socioeconomics team, CDP Records Management team and IT work to develop a data strategy that provides answers to the above questions, and with approval from the P&D Director, this strategy be implemented to enable reporting and continuous improvement (i.e. performance measurement) functions

Recommendations & Actions – Director's Office

Recommendation No. 24










	Departmental Challenge	Information Management
	Root Issue	Property file information is spread across multiple systems, drives and facilities
	Recommendation	Bring property file information into one information management system
	Target Outcome	A plan for how P&D can transition from fragmented property file information to a centralized, organized, access-managed, searchable records management system
	Responsible	Planning & Development Director's Office
	Timeline	Year 3








Action Items

- It is recommended that P&D develop a roadmap for moving from CDP and SC use of Shared Drives to store property file information to using OpenText content suite, currently in use by Land Administration, which is based on the following considerations:
 - As observed through the current state assessment, Land Administration has enjoyed effective use of OpenText to date with the exception of not benefiting from some basic configuration of metadata enforcement, reporting/querying and permissions management
 - The organization-wide direction appears to favour a move towards using OpenText as the enterprise document repository and records management solution
 - If basic configuration of OpenText can be completed, its records management module can be switched on, which would automate archiving and disposition, reducing Records Management (RM) effort over time
 - Property files contain public information assets and minimal sensitive information, making them lower risk for transition to OpenText than documents of a more sensitive nature
 - Either Accela or a new system could be configured to directly store data in OpenText
- With leadership from the business and consultation with Land Administration staff, IT, CDP, RM and corporate RM, a roadmap for what could be transitioned first and at what cost (consider software licenses, one-time implementation/configuration costs, and ongoing system maintenance costs) can be developed; it is recommended P&D access a third-party for subject matter guidance (ideally a certified official partner of OpenText or consultant certified by OpenText in Content Suite 16 or higher)








Recommendations & Actions – Director’s Office

Recommendation No. 25				Action Items	
	Departmental Challenge	Technology and Assets		<ul style="list-style-type: none">• Configure Accela to authorize Clerks from CDP and Safety Codes to edit permit types and basic fields on behalf of an applicant post-submission	
	Root Issue	Accela is not configured to allow permit types and basic fields to be corrected post-submission			
	Recommendation	Consider investing in configuration changes, while taking a preventative approach			
	Target Outcome	Reconfiguring Accela to allow corrections on development permit applications is likely to minimize the number of refunds and resubmissions required by applicants, points of frustration, and delays			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 1			

Recommendations & Actions – Director’s Office

Recommendation No. 26				Action Items
	Departmental Challenge	Technology and Assets		<ul style="list-style-type: none">Review existing budgets to assess whether existing funds can be more strategically focused to address particular issues identified by staff/employees, including items such as: customizing tools in alignment with software updates; usability of the mobile Accela application on inspector tablets; a reliable high volume scanner; procurement of a software to process design renderings, etc.
	Root Issue	There is a lack of resources to maintain software and hardware technology assets		
	Recommendation	Perform software and hardware rationalization assessments to determine if efficiencies can be realized		
	Target Outcome	Better aligning resources to address issues identified in software and hardware technology assets		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 2		

Recommendations & Actions – Director’s Office

Recommendation No. 27				Action Items
	Departmental Challenge	Metrics and Reporting		<ul style="list-style-type: none">• Whomever is assigned as system administrator for Accela needs to monitor for bounce-backs (system generated notices of undeliverable mail) and immediately notify whoever is assigned to manage the circulation list within P&D• If possible, assign someone from each branch who will be the official “owner” of the master circulation list for their branch, as it is configured in Accela, and have them notified by the system if a circulation goes undeliverable (and have them follow up for the new email/contact)• Transition over time to requiring only general or shared inbox emails for stakeholders/entities on each circulation list, so there is low likelihood of future bounce-backs• As feedback is received from stakeholders, advise the applicant of any actions required from them, while ensuring they are aware that feedback is still outstanding (only applicable if the feedback is “stand-alone” and not dependent on other stakeholder feedback yet to be received)
	Root Issue	Frequent changes to the circulation list and delays in actioning feedback is slowing the application review process		
	Recommendation	Actively manage the circulation lists and action feedback as it is received		
	Target Outcome	Increased reliability of Accela circulations over time and quicker resolution of feedback by applicants by sharing it in real-time with them as it comes in, when possible		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 3		

Recommendations & Actions – Director’s Office

Recommendation No. 28










Action Items








	Departmental Challenge	Technology and Assets
	Root Issue	E-permitting does not effectively prevent the submission of incomplete applications
	Recommendation	Enforce a minimum one attachment business rule (as starting point) for all development and building applications submitted through E-Permitting
	Target Outcome	Reduced application processing time and internal efficiency
	Responsible	Planning & Development Director's Office
	Timeline	Year 1

- On any E-Permitting application page that solicits attachments, configure Accela to apply a business rule that prevents the user from progressing to the next page without first uploading a minimum of one attachment
- If the applicant tries to proceed to the next page without uploading at least one attachment, issue an error in red writing that reminds applicants their application cannot be submitted until the documents specified in the checklist relevant to their application (provide a link to the checklist on the website if possible) have been added
- Consult Accela consultants for an estimated cost/effort of making this configuration change

Recommendations & Actions – Director’s Office


Recommendation No. 29				Action Items	
	Departmental Challenge	Metrics and Reporting		<ul style="list-style-type: none">Consider use of the existing Civic Insights tool to publish data reports (e.g. total number of permits, number of permits in process, number of permits per year, etc) to the RMWB website while simultaneously planning for an open-data strategy (i.e. a strategy that enables users to manipulate data and extract a larger amount of information)To prepare for an open-data strategy, and to ensure data quality and culture, consider assigning resources (e.g. Planners) to cleanse existing data in Accela (e.g. close outdated permits and ensure reports do not capture obsolete information)While the Socio-economics team has recently gained access to Accela data tables, access to PowerBI could be extended to additional resources as deemed appropriateConsider using priority process performance measures (examples of which have been outlined in the Continuous Improvement Plan section of this report) as metrics used to drive reports	
	Root Issue	Reports are not configured and require manual compilation			
	Recommendation	Increase access to Accela data tables to establish live data feeds to standard reports in Power BI (a data visualization tool)			
	Target Outcome	Improved ease of measurement and reporting			
	Responsible	Planning & Development Director's Office			
	Timeline	Year 2			







Recommendations & Actions – Director’s Office

Recommendation No. 30				Action Items
	Departmental Challenge	Metrics and Reporting		<ul style="list-style-type: none">• In alignment with input collected from P&D leadership, determine which process performance measures are of priority given the four goals outlined below and in the Continuous Improvement Plan section of this report:<ul style="list-style-type: none">• Goal #1: Be an enabler of economic activity• Goal #2: Provide exceptional customer service• Goal #3: Streamline steps and processes within P&D• Goal #4: Increase stakeholder confidence in the Department• Attribute a minimum of one performance measure to each business goal and assign a resource responsible for designing, tracking and reporting on each respective performance measure
	Root Issue	Few customer service metrics and process controls exist to measure business effectiveness		
	Recommendation	Have P&D leadership team agree on priority business goals and underlying performance measures		
	Target Outcome	Improved measurement of business effectiveness to drive continuous improvement		
	Responsible	Planning & Development Director's Office		
	Timeline	Year 3		

Recommendations & Actions – Director’s Office

Recommendation No. 31



	Departmental Challenge	Technology and Assets
	Root Issue	E-Permitting is not intuitive or user-friendly in some aspects
	Recommendation	Make targeted improvements to configuration, while exploring procurement of a new permitting solution
	Target Outcome	Incremental improvements to user experience while planning for the long term
	Responsible	Planning & Development Director's Office
	Timeline	Year 1

Action Items

- Add a search or sort function within E-Permitting, which would allow users to more quickly find the permit they are looking for, instead of needing to scroll through multiple pages
- Make the Apply for Permit “button” look more like a button, such as by centering the text in its container, increasing the font size, rounding the corners and applying a medium blue border around the entire button, so it does not look like a heading

Home

Building

Planning/Engineering

Business Licensing







Apply for a Permit

- Add a legend or link to a legend for what the various workflow statuses mean
- While pursuing these interim, targeted improvements to user experience design, begin the process of exploring solutions for procurement which would inform an RFP process

Recommendations & Actions – Director’s Office

Recommendation No. 32



	Departmental Challenge	Technology and Assets
	Root Issue	OpenText was not configured to function effectively as a records management system
	Recommendation	Make key configurations to OpenText to harness its full potential as a records management system
	Target Outcome	Improved records management functions using OpenText
	Responsible	Planning & Development Director's Office
	Timeline	Year 2

Action Items

- OpenText software is used by Land Administration (LA) to store and manage agreements related to property files, but is not implemented for use by other branches within P&D or across all departments LA may collaborate with
- Solicit a certified OpenText consultant to configure the system to enforce minimum metadata that can be used to easily query the system and develop reports; enable metadata inheritance from parent folders, as part of this exercise
- Configure the records management module of OpenText to automate disposition and retention activities, to reduce records management workload over time
- Consider the cost and benefits of using OpenText and a master property file in OpenText as the repository by which Accela or a new permitting/licensing solution stores, organizes and tags (with metadata) active and/or completed files

5.2








RECOMMENDATIONS AND ACTIONS

Community Development Planning










Recommendations & Actions

Community Development Planning

Recommendation No. 33				Action Items
	Departmental Challenge	Business Process		<ul style="list-style-type: none">Assign a Planner to identify these impacted properties which are missing as-built grading certificates, create a list of those to be contacted, and identify any funds / partnerships that could be leveraged (such as with a third-party surveyor) to minimize the financial burden on ownersWork with Legal and Communications to draft a letter to notify these property owners, outlining why they are being contacted, why they require these certificates, how it will benefit them to come into compliance, what the grace period is, guidance on how/who to obtain one from, and how P&D will make the administrative process easy and painless; determine internally how enforcement will be handled for those who do not comply in time
	Root Issue	Conditions added to development permits for as-built grading certificates issued between 2016-2017 were not time-bound		
	Recommendation	Identify the properties impacted by as-built grading certificates issued between 2016-2017 that were not time-bound, proactively notify these owners, and offer a one-year grace period		
	Target Outcome	This will improve future customer satisfaction when these owners obtain a Real Property Report and Compliance Certificate, which will show their lot grading is compliant		
	Responsible	Community Development Planning		
	Timeline	Year 2		

Recommendations & Actions

Community Development Planning

Recommendation No. 34				Action Items
	Departmental Challenge	Business Process		<p>Note: The purpose of this recommendation is to summarize proposed changes to the Development Permit process; action items outlined below may correspond with additional root issues identified in this report.</p> <ul style="list-style-type: none">• Provide applicants with information on the different Development Permit types and their requirements (e.g. detail on the website explaining permit groups/types, application requirements and processing steps; external and internal checklists specific to permit types; etc.)• To make E-Permitting more intuitive to navigate, group Development Permits by "permit type" and clarify the process to mirror permit groupings (e.g., Residential, Industrial, Commercial, etc.) on the website• Eliminate “double” submission processes for residents seeking to pursue simple development projects, which is proven to work effectively in other jurisdictions• Create a “single application” submission (and workflow) for more straightforward, low risk, high volume residential permits (e.g., such as for Decks, Accessory Structures, Single Detached Dwellings and Manufactured Homes) under the Building tab in E-Permitting; continue to require both review by a Planner from CDP and Building Safety Codes Officer from SC; consider how the Development Permit appeal process would be communicated in the context of a Building Permit issuance
	Root Issue	In some scenarios the requirement to have two separate permits (development permit and building permit) can be streamlined into one		
	Recommendation	Re-engineer the Development Permit process		
	Target Outcome	A reduction in the number of inquiries submitted to staff, the number of incorrect or incomplete application submissions, and in processing time; improved customer service		
	Responsible	Community Development Planning		
	Timeline	Year 1		

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Recommendations & Actions

Community Development Planning

Recommendation No. 34

(contd)



Action Items

	Departmental Challenge	Business Process
	Root Issue	In some scenarios the requirement to have two separate permits (development permit and building permit) can be streamlined into one
	Recommendation	Re-engineer the Development Permit process
	Target Outcome	A reduction in the number of inquiries submitted to staff, the number of incorrect or incomplete application submissions, and in processing time; improved customer service
	Responsible	Community Development Planning
	Timeline	Year 1

Note: The purpose of this recommendation is to summarize proposed changes to the Development Permit process; action items outlined below may correspond with additional root issues identified in this report.

- Review stakeholder lists and circulation periods by DP type and adjust/lower where appropriate based on legislation, experience and level of risk
- Consider having Planners highlight key aspects of a proposal that may require a reviewer's attention prior to circulation
- Institute a standard practice for reminding stakeholders in a circulation notice of how many days are left to provide feedback before the application is progressed to the next step; consider requiring a stakeholder to request an extension to the circulation period in writing if it exceeds a defined threshold (e.g., 3 business days) and notify the applicant of any significant extensions granted
- Circulation periods can be advertised on the website under each development permit type, so applicants are aware of how long they can expect their application to be out for review by relevant stakeholders/entities as a step in the process
- Where feedback received through the circulation notice is not dependent on other feedback (e.g., requirement for a traffic impact assessment), turn that feedback around to the applicant prior to the end of the circulation period
- Improve understanding of Change of Use requirements and process both internally and externally, including describing it as a permit type on the website, why it arises, common triggers of this permit, the requirements and target processing time
- Improve customer service by providing a transparent mechanism for escalation that is orderly and empowers front-line staff
- Implement a mechanism or means to provide an escalation path from a Planner to a Supervisor, and higher if needed, that an applicant can access on their own (and do not allow escalations that "jump" levels)

Recommendations & Actions

Community Development Planning

Recommendation No. 35



Action Items








	Departmental Challenge	Business Process
	Root Issue	Unclear processes related to business licensing
	Recommendation	Re-engineer the Business License process
	Target Outcome	Improve customer service, knowledge and satisfaction with the business licensing process, and clarity and transparency on exemptions
	Responsible	Community Development Planning
	Timeline	Year 1

Note: The purpose of this recommendation is to summarize proposed changes to the Business License process; action items outlined below may correspond with additional root issues identified in this report.

- For the two types/nine categories of Business Licenses, develop a checklist clearly outlining the requirements for applying; these checklists would be used as the basis for updating application forms and guidance on the website, E-Permitting and in guiding application review; re-design process flow map based on permit categories
- Add a process step where a "date-stamped" list of active Business Licenses is posted to the RMWB website under a Business Directory as a feature and benefit of having a valid business license; the list should be actively maintained and posted on a regular basis (e.g., monthly)
- For business types that are exempt from a Business License, provide the criteria for exemption on the website and the list of approved exemptions; this will require the review, completion and continual updating of the existing internal Exemption List (Excel spreadsheet dated May 2017)
- Implement a process for enforcing Business Licenses to improve the perception of fairness of business operators in the region, while offering benefits for compliance (e.g., Business Directory), by:
 - Following up via phone/email to business owners of recently expired Business Licenses to inquire about their expiration, explain the benefits of a business license and extend information on business supports/resources if the business is ceasing operations
 - Appointing an enforcement process owner in P&D who is the point of contact for notification of non-compliance from other departments and teams, such as Fire Prevention
 - Pulling a periodic report of recently expired Business Licenses and "auditing" a select number of businesses to have a Development Officer conduct a site visit (audit parameters could be business type, location, etc.)








Recommendations & Actions

Community Development Planning

Recommendation No. 36				Action Items
	Departmental Challenge	Business Process		<ul style="list-style-type: none">• A resource (e.g. the group responsible for Land Use Bylaw amendments) can be assigned responsibility for monitoring approved Bylaw Amendments and actioning updates to files (e.g. SOPs, maps, charts and plans) after Council has approved an amendment• A resource within the GIS team in the IT department must also be assigned responsibility for making updates to geospatial; the GIS team member would be required to send a confirmation email of updates to the GIS data having been actioned• Over-time and with leadership from Socio-economics, clean-up of these foundational datasets can occur
	Root Issue	Key steps in the Land Use Bylaw amendment process are being skipped		
	Recommendation	When a Land Use Bylaw amendment is approved, ensure internal documentation and systems are fully updated with notification to P&D staff, and assign clear responsibility for these steps		
	Target Outcome	Consistent updates to Land Use Bylaw data files and decreased risk of error in future planning and of potential inconsistencies in how the Bylaw is being applied to different properties across RMWB		
	Responsible	Community Development Planning		
	Timeline	Year 2		

Recommendations & Actions

Community Development Planning

Recommendation No. 37				Action Items
	Departmental Challenge	Business Process		<ul style="list-style-type: none">When a variance has been identified, ensure there is a review of the corresponding development permit and if one does not exist, do not approve a variance application in the absence of oneInvestigate if it would be possible to have Accela save in-progress and approved variance applications (workflow data) as a subfolder within a development permit folder
	Root Issue	Variance applications are processed separately from development permit applications		
	Recommendation	Require approved variances to be linked to the associated development permit in Accela		
	Target Outcome	Increased conformance to the Land Use Bylaw in how variances are handled		
	Responsible	Community Development Planning		
	Timeline	Year 3		

Recommendations & Actions

Community Development Planning

Recommendation No. 38



	Departmental Challenge	Business Process
	Root Issue	Fee collection processes related to Special Event Bookings and Sign Bookings processes are not controlled for risk
	Recommendation	Transition paper booking processes to an online booking and payment app
	Target Outcome	A traceable process for booking and fee collection that is controlled for risk; improved internal controls and efficiency on payment process; enhanced customer service by providing online payment
	Responsible	Community Development Planning
	Timeline	Year 3

Action Items

- Inquire with RMWB IT, Finance and Communications to understand what functionality exists or could be procured/set-up that would allow for municipal Special Event Bookings and municipal Sign Bookings to be processed through a technology solution; Accela is not recommended for this as it would appear to require significant configuration and could confuse those who use it for permits, whereas an inexpensive out-of-box solution would be preferred
 - Align Special Event Bookings to Park bookings and inspections
- Requests can remain to be submitted in-person when front-counter service resumes; however, this solution should continue to be used to track bookings and payments electronically so there is an audit trail
- Transition from email intake of bookings to PULSE email to align with customer service organizational strategy
- Special Event Bookings
 - Add a 'Monitor for Compliance' process and derive steps for how this can be enforced
- Sign Bookings
 - Consider pro-rated fees based on usage

Recommendations & Actions

Community Development Planning

Recommendation No. 39










	Departmental Challenge	Business Process
	Root Issue	No formal process exists to validate business licensing and renewals
	Recommendation	Implement a process for enforcing Business Licenses and pair enforcement with business enablement activities to provide better customer service
	Target Outcome	Increase in business licensing compliance, the benefits of business licensing are made clearer, and improved perception of objectivity and fairness of business licensing enforcement
	Responsible	Community Development Planning
	Timeline	Year 2

Action Items

- In the automated email sent to active business license holders when their license is approaching its expiry date, consider including additional details such as the benefits of continuing to hold a business license (e.g. run a legal business operation, supports the development of promotional materials aimed at attracting investment to the Region, provides insights on local business activity, etc.) and repercussions of operating without one (e.g. holds placed on upcoming permits, fines, the issuance of a stop order, etc.)
- In the event a property owner allows their license to expire without contacting RMWB, Permitting and Licensing Clerks could complete a follow up by phone or email to confirm the business owner intended to not renew their license and offer to provide them assistance with the renewal process
- A directory of active businesses could be posted publicly to the business licensing page of the website (such as by developing a report that exports this information and posting it periodically); this could both aid with enforcement, public awareness of approved businesses, and in promoting businesses in the RMWB (see Maple Ridge, as an [example](#))
- Meet with the team responsible for bylaw enforcement services (which has been moved outside of the Department) and discuss the desired approach to enforcing business licenses (among other topics such as development permits, etc.); consider taking a passive approach to enforcing home-based businesses (i.e. in response to bylaw complaints) and an active approach to randomly “auditing” active/recently expired Business Licenses for Commercial, Industrial and Institutional uses (based on a periodic report to be sent to the bylaw enforcement services team)
- Consider alignment with the annual inspection process led by the Regional Emergency Services (RES) Department’s Safety Codes Branch
- Where a business is identified as needing to close, share knowledge/recommendations for where they can access business supports
- A supervisor or manager from CDP should be assigned as the primary liaison with Development Compliance Officers, so there is effective communication

Recommendations & Actions

Community Development Planning

Recommendation No. 40				Action Items
	Departmental Challenge	Policy		<ul style="list-style-type: none">Using the re-engineered Business License process as a guide and ensuring alignment with relevant legislation, bylaws and administrative directives, develop a new, written management guidance for the Business Licensing processRefer to any work already completed to develop an overarching Business Licensing BylawEnsure the new guidance and process addresses which businesses are exempt from requiring a business license, publish this guidance on exemptions on the Business Licensing page and communicate this as reference/job aid material to Permitting and Licensing ClerksCommunicate these changes using the process outlined in the Continuous Improvement Plan, and ensure any future changes to this guidance and process undergo a controlled change (versioning and approval) process
	Root Issue	Business licensing policy directives are not clearly understood		
	Recommendation	Formalize management’s guidance on Business Licenses		
	Target Outcome	Clarity for all internal stakeholders, regardless of role, of why and when a Business License is needed, as well as management’s general approach to administering and enforcing them		
	Responsible	Community Development Planning		
	Timeline	Year 2		

Recommendations & Actions

Community Development Planning

Recommendation No. 41



Action Items

	Departmental Challenge	Policy
	Root Issue	The criteria constituting a “change of use” is not universally understood
	Recommendation	Publish in simple terms on the website what is meant by “change of use”, why a development permit may be needed and what the exemptions are
	Target Outcome	Improved understanding of the Change of Use Permit and fewer inquiries
	Responsible	Community Development Planning
	Timeline	Year 1

- When the Development Permit pages are added and designed, there will be a button to a page describing Change of Use Development Permits
- On this page, it should explain in simple terms that a change in (or an act that is likely to change) how a land or building is used can trigger the requirement for this development permit; it should also note this requirement can also be triggered when occupancy of a commercial, industrial and institutional buildings occurs
- It can explain that whatever use the building or structure changes to must also comply with the permitted and discretionary uses allowed in that Land Use District
- It could provide a description of 2-3 common examples of applicants requiring a change of use permit, and if one is required, an occupancy permit from Safety Codes would also be needed, followed by a Business License if a business is being operated out of the space
- This page could also include information on exemptions, with both a description (in simple terms) of the related Land Use Bylaw Amendment and list of exemptions, as well as the pre-existing web form that allows people to submit inquiries about whether their development qualifies for an exemption

Recommendations & Actions

Community Development Planning

Recommendation No. 42










Action Items

	Departmental Challenge	Policy
	Root Issue	Low quality site/floor plans and drawings are not refused during the application stage
	Recommendation	Educate staff and applicants on minimum requirements for site plans/drawings and refuse ones that do not meet the requirements
	Target Outcome	Improved customer experience due to less likelihood of encountering unexpected costs arising from details overlooked because of poor quality site plans
	Responsible	Community Development Planning
	Timeline	Year 2

- Create an animated video that overviews **why** a site plan is needed, **how** to develop/obtain a site plan, **what** the minimum requirements are for one (e.g. drawn to scale, includes a legend, etc.), and the benefits to the applicant of meeting these requirements (i.e. faster processing time, lower likelihood of encountering unexpected costs, better project scope management, etc.); use the [existing how-to guide](#) to inform the video storyboard and script
- Post this animated video on the main landing page for Planning and Development as a resource and link to it from any of the specific Development and Safety Codes Permit pages, as nearly all applications require a site plan
- Consider uploading templates of generic site plans to specific Development Permit and Safety Code Permit web pages to be used for decks, signs on private land, etc.
- Consider the use of a geographic information system (e.g., Pictometry) that allows an applicant to upload measurements and make changes directly to the template
- Consider creating a Site Plan checklist that outlines the requirements for obtaining a site plan

Recommendations & Actions

Community Development Planning

Recommendation No. 43				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Assign a Planner to identify these impacted properties which require unit addressing, create a list of those to be contacted, and identify any funds / partnerships that could be leveraged (such as those who could help cover signage costs required) to minimize the financial burden on ownersWork with Legal and Communications to draft a letter to notify these property owners, outlining why they are being contacted, why they require unit addressing, how it will benefit them to come into compliance, what the grace period is, guidance on what their new address will be, and how P&D will make the administrative process easy and painless; determine internally how enforcement will be handled for those who do not update their address in time
	Root Issue	In the past, multi-tenant buildings did not require unit addresses which now require corrections		
	Recommendation	Identify the multi-tenant buildings that did not previously require unit addresses and proactively notify these owners of the need to correct this, offering a two-year grace period and waiving the application fee		
	Target Outcome	This will improve future customer satisfaction when these owners participate in the census or obtain future permits because they will not be unexpectedly held up by this requirement		
	Responsible	Community Development Planning		
	Timeline	Year 3		

Recommendations & Actions

Community Development Planning

Recommendation No. 44










Action Items

	Departmental Challenge	External Communications
	Root Issue	The Land Use Bylaw is not written in a manner easy for the public to comprehend or made easy to interpret
	Recommendation	Ensure the revised Land Use Bylaw is user friendly
	Target Outcome	Easier reference, navigation and interpretation of the Land Use Bylaw by the public
	Responsible	Community Development Planning
	Timeline	Year 2

- Informed by P&D's management and Legal's review of these recommendations, determine which recommendations will be pursued in the short term that will require a material change to the current draft version of the Land Use Bylaw (presented in early 2021 to Council)
- Ensure there is a master glossary of terms in the newly drafted Land Use Bylaw and that in the future, amendments can and will be made directly to the document, as opposed to maintained in separate files
- Hyperlink key terms that redirect readers to specific sections of the Land Use Bylaw
- Work with Communications to develop infographics that help explain complicated sections of the Land Use Bylaw and upload guidance to the RMWB website

Recommendations & Actions

Community Development Planning

Recommendation No. 45				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">• Develop a checklist of documents and permits that a buyer would want to verify on a property• Include an overview of the difference (benefits and drawbacks or consequences) of opting for title insurance versus obtaining a Real Property Report (RPR) and compliance certificate, and include case studies, compliance certificate and file search process information• Publish this document on the RMWB website as a resource and promote its use in the community using various communications channels and through the Fort McMurray Real Estate Board
	Root Issue	The impact to home buyers/sellers using title insurance instead of obtaining an RPR is not broadly understood		
	Recommendation	Work with the Realtor's Association to develop and publish a home buyer's guidance document on the website		
	Target Outcome	A gradual reduction in the use of title insurance and increase in the degree of property compliance across RMWB communities		
	Responsible	Community Development Planning		
	Timeline	Year 3		

Recommendations & Actions

Community Development Planning

Recommendation No. 46



Action Items

	Departmental Challenge	External Communications
	Root Issue	The application process for making a Plan Amendment is not universally understood
	Recommendation	Add a purpose description to the Plan Amendment application form and an overview of this service to the RMWB website
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	<u>Yes</u>

- Consider adding a purpose description to the [Amendment Application Form](#) (e.g. Request changes to the LUB, Municipal Development Plan and Area Structure Plan)
- To increase an applicant's understanding on where a plan amendment may be useful, consider adding an overview or description of this service to the RMWB website
- Consider referencing the checklist on the application form
- Define a clear process for submitting a Plan Amendment application (e.g. by email or E-Permitting)

Recommendations & Actions

Community Development Planning

Recommendation No. 47











	Departmental Challenge	External Communications
	Root Issue	The Civic Translator tool is not universally understood
	Recommendation	Add a purpose description to the Civic Address / Legal Description Conversion web page
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	N/A

Action Items

- Consider adding a purpose description to the [Civic Address / Legal Description Conversion](#) web page (e.g. Find your legal address, which is a minimum requirement on nearly every application/ request)
- Add a link to the [Permits and Resources](#) web page directing applicants to the Civic Translator
- Work with a resource in the IT Department to secure and encrypt the Civic Address / Legal Description Conversion web page
- Add the following information to the Civic Address / Legal Description Conversion web page: The definitions for both 'Civic Address' and 'Legal Address,' a rationale as to why either may be required, and instructions on how to use the Civic Translator tool

Recommendations & Actions

Community Development Planning

Recommendation No. 48				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to Civic Insight web page (e.g. Review the status of permits for a specific property within the RMWB) along with a description of the tool’s functionality and valueWorking alongside the Socioeconomics team, review and update data on a monthly basis to ensure it is up-to-dateReference the Civic Insight tool on relevant web pages of the RMWB website
	Root Issue	The Civic Insight tool is not universally understood		
	Recommendation	Add a purpose description to the Civic Insight web page		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	N/A		

Recommendations & Actions

Community Development Planning

Recommendation No. 49



Action Items

	Departmental Challenge	External Communications
	Root Issue	The application process for a Sign Permit is not universally understood
	Recommendation	Create a Sign Permit Application form with a corresponding purpose description
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	<u>Yes</u>

- Create a dedicated application form for Sign Permits and define a clear process for submitting the application
- Consider referencing the [Sign Development Permit Application Checklist](#) on the proposed Sign Permit Application form
- Consider adding a purpose description to the proposed Sign Permit Application form (e.g. Seek approval to put a sign on their property)
- Consider adding the following information to the proposed Sign Permit Application form: when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- To facilitate an applicant correctly uploading information on a site plan, add a link to the checklist that directs applicants to the “how to draw a site plan” brochure
- To ensure the “Letter of Authorization from Owner” requirement is not overlooked, consider adding this as a separate section on the checklist for applicants who are not registered owners

Recommendations & Actions

Community Development Planning

Recommendation No. 50



	Departmental Challenge	External Communications
	Root Issue	The application process for a Development Permit (General) is not universally understood
	Recommendation	Add a purpose description to the Development Permit Application Form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	Yes









Action Items

- Consider adding a purpose description to the [Development Permit Application Form](#) (e.g. Seek approval to use or develop either land or a building)
- Define a clear process for submitting the Development Permit Application Form
- Consider adding guidance on how to calculate lot area, building area, and accessory coverage to the Development Permit Application Form
- Consider adding the following information to the Development Permit Application Form and/or on the proposed Development Permit web page: the different types of development permits available, the context in which they are required, any supporting documentation that must be submitted along with the application, and any relevant checklists
- Consider combining development permits and corresponding checklists based on the following observations:

1. Accessory Structure	10. Home business
2. Decks	11. Manufactured home
3. Basement suite	12. Multi-family development
4. Addition to single-family residential	13. Project accommodation (e.g. camps)
5. Rural area single family residential	14. Stockpiling
6. Boarding house	15. Taiga Nova commercial and industrial
7. Demolition	16. City Centre commercial and industrial
8. First use or change of use	17. Urban, commercial, industrial or institutional
9. New use of an existing commercial or industrial building	18. Sign
- Number 1 and 2 appear duplicative because a deck is a form of accessory structure
- Number 8 and 9 appear to have some overlap
- Number 11 would typically be referred to as a mobile home by the public
- Number 13 may also be referred to as camps by the industry
- Number 16 and 17 appear to have some overlap
- Number 18 does not explain this is an application to erect a sign on private land; a member of the public has to find the Portable Signs page to find information on the rules surrounding signs, which does not include a link to the Sign Permit application or explain *why* signs cannot be placed on municipal land (it also provides no guidance on how to check if the sign they are seeking to erect will be on private or municipal land)

Recommendations & Actions

Community Development Planning

Recommendation No. 51				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Cannabis Retail Store Development Permit Application Form (e.g. Seek approval to use or develop either land or a building, specifically involving cannabis)Consider adding the following information to the application form or checklist: when an applicant is required to apply, the application process (including the process following submission), and any applicable feesHyperlink the bylaw and checklist mentioned in the Cannabis Retail Store Development Permit Application Form
	Root Issue	The application process for a Development Permit (Cannabis) is not universally understood		
	Recommendation	Add a purpose description to the Cannabis Retail Store Development Permit Application Form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	Yes		

Recommendations & Actions

Community Development Planning

Recommendation No. 52



	Departmental Challenge	External Communications
	Root Issue	The application process for a Development Permit (Rural Area Oil Sands/Pilot Plants) is not universally understood
	Recommendation	Add a purpose description to the Development Permit (Rural Area Oil Sands/Pilot Plants) application form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	Yes

Action Items

- Consider adding a purpose description to the [Development Permit \(Rural Area Oil Sands/Pilot Plants\)](#) application form (e.g. Seek approval to use or develop either land or a building, specifically involving rural area oil sands/pilot plants)
- Consider adding the following information to the application form or checklist: a description of the permit, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- Reference the checklist on the application form (which according to the checklist, should also be submitted alongside the application)
- To minimize confusion arising from a lack of consistency in titles, consider alignment based on the following observations:
 - The name of the link under the permits tab is: Rural area new oil sands/pilot plants development permit application
 - The name of the link under the checklist tab is: Oil sands development permit application checklist
 - The title of checklist document once opened is: New Oil Sands Development

Recommendations & Actions

Community Development Planning

Recommendation No. 53











	Departmental Challenge	External Communications
	Root Issue	The application process for a Development Permit (Subdivision) is not universally understood
	Recommendation	Add a purpose description to the Subdivision Application Form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	Yes

Action Items

- Consider adding a purpose description to the [Subdivision Application Form](#) (e.g. Seek approval to use or develop either land or a building, specifically involving subdivisions)
- Consider adding the following information to the application form or checklist: a description of the permit, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- Reference the checklist on the application form (which according to the checklist, should also be submitted alongside the application)
- Add guidance to the fee schedule presently attached to the checklist with descriptions on each of the 10 potential items an applicant may need as part of their application, when they may be needed, why they may be needed, and where to submit the fee

Recommendations & Actions

Community Development Planning

Recommendation No. 54				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Application for Home Business form (e.g. Seek approval to operate a home-based business within the Municipality)The application and the checklist is combined in one PDF file located under the “checklists” drop down menu; ensure this combined PDF is also mentioned in the “application” drop down menuAlternatively, consider separating the application form and the checklist into two PDF documents, and update the “checklist” and “application” drop down menus accordingly	
	Root Issue	The application process for a Home Business Development Permit is not universally understood			
	Recommendation	Add a purpose description to the Application for Home Business form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Community Development Planning			
	Timeline	Year 1			
	Checklist Currently Exists?	Yes			

Recommendations & Actions

Community Development Planning

Recommendation No. 55



	Departmental Challenge	External Communications
	Root Issue	The application process for a Compliance Certificate is not universally understood
	Recommendation	Add a purpose description to the Compliance Certificate Application Form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	N/A

Action Items

- Consider adding a purpose description to the [Compliance Certificate Application Form](#) (e.g. Seeking validation that the building, according to the Real Property Report is located on the lot in accordance with the separation distance and yard and building setbacks regulations of the Land Use Bylaw)
- Consider adding the following information to the application form: a description of the certificate form, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- To facilitate an applicant's ability to obtain a copy of their Real Property Report, include the contact information of the records team on the application
- Under "Credit Card Information," consider adding an explanation as to what a card type is (e.g. checkboxes for Visa, MasterCard, etc.)
- As the application mentions the applicant should include a development permit checklist in their application, clearly define which development permit checklists should be used in the case of a Compliance Certificate

Recommendations & Actions

Community Development Planning

Recommendation No. 56











	Departmental Challenge	External Communications
	Root Issue	The application process for a Variance Application is not universally understood
	Recommendation	Add a purpose description to the Variance Application Form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	No

Action Items

- Consider adding a purpose description to the [Variance Application Form](#) (e.g. Seek approval to receive an exception under existing land use or development restrictions)
- Consider adding the following information to the application form: a description of the certificate form, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- Title and hyperlink the mention of Bylaw 99/059
- Add guidance on where to obtain the information required under “Property Information: (e.g. Alberta Township Grid System LSD, Sec, TWP, Ranga, W4M or Certificate of Title Number)









Recommendations & Actions

Community Development Planning

Recommendation No. 57				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Business License Application form (e.g. Seek approval for a business license)Consider adding the following information to the application form: a description of the license, when an applicant is required to apply, the application process (including the process following submission), and any applicable feesAs applicants are required to check off a list of supporting documents they submit to the municipality, there may be value in adding a description of which documents are required for which category of business license
	Root Issue	The application process for a Business License Application is not universally understood		
	Recommendation	Add a purpose description to the Business License Application form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	No		









Recommendations & Actions

Community Development Planning

Recommendation No. 58				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Home Occupation Declaration form (e.g. Informs the municipality that a business will be operating at an address)Clearly indicate that there is no fee associated with the application
	Root Issue	The application process for a Home Occupation Declaration is not universally understood		
	Recommendation	Add a purpose description to the Home Occupation Declaration form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	Yes		









Recommendations & Actions

Community Development Planning

Recommendation No. 59				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the How to Draw a Site and Floor Plan guide (e.g. A guide for applicants to follow when submitting a site plan or floor plan to the municipality)Consider reorganizing where this document is located on the RMWB website (it is presently organized under the “applications, forms and permits” drop down menu, despite it not being an application, form or permit)Consider adding information regarding which platforms the applicant can use to create a site/floor plan to further enhance the customer experience
	Root Issue	The process for a how to draw a site plan is not universally understood		
	Recommendation	Add a purpose description to the How to Draw a Site and Floor Plan guide		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	No		









Recommendations & Actions

Community Development Planning

Recommendation No. 60				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Landscape Inspection Application form (e.g. An application to request an inspection for landscaping)Consider attaching a fee schedule to the application	
	Root Issue	The process for a Landscape Inspection Application is not universally understood			
	Recommendation	Add a purpose description to the Landscape Inspection Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Community Development Planning			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Community Development Planning

Recommendation No. 61				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Noise Bylaw Letter of Request form (e.g. Request a new noise bylaw to be implemented)Consider adding the following information to the application form: a description of what the application form is, when an applicant is required to apply, the application process (including the process following submission), and any applicable feesLink a copy of the Noise Bylaw to the applicationClearly outline how this letter relates to P&D activities
	Root Issue	The process for a Noise Bylaw Letter of Request is not universally understood		
	Recommendation	Add a purpose description to the Noise Bylaw Letter of Request form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	No		

Recommendations & Actions

Community Development Planning

Recommendation No. 62











Action Items

	Departmental Challenge	External Communications
	Root Issue	Pre-application requirements for development permit applications are not universally understood
	Recommendation	Add a purpose description to the Pre-Application Requirements for Development Permit Applications form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Community Development Planning
	Timeline	Year 1
	Checklist Currently Exists?	No

- Consider adding a purpose description to the [Pre-Application Requirements for Development Permit Applications](#) form (e.g. An application used to book a pre-application meeting with the municipality)
- Clearly outline which applicants are required to attend a pre-application meeting (e.g. applications for multi-family, commercial, industrial, institutional and new oil sands plants) and which applicants are exempt from this requirement








Recommendations & Actions

Community Development Planning

Recommendation No. 63				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Special Event Permit Application form (e.g. Seek approval to host a special event located on Municipal parks, any public land, roadway or operated facility)Consider adding the following information to the application form: a description of the permit, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
	Root Issue	The process for a Special Event Permit Application is not universally understood		
	Recommendation	Add a purpose description to the Special Event Permit Application form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Community Development Planning		
	Timeline	Year 1		
	Checklist Currently Exists?	Yes		

Recommendations & Actions

Community Development Planning

Recommendation No. 64				Action Items
	Departmental Challenge	Forms and Checklists		<ul style="list-style-type: none">• Have the process owner for development permits (or planners) sit down with the Clerks to develop internal checklists of what documents are required for each type of development permit to be complete, and be sure to include commonly missed items such as fire protection system plans/drawings and landscaping plans• Have the process owner circulate the draft internal checklists within P&D as well as to Engineering, Fire Prevention and Legal to confirm nothing critical is missing• Incorporate feedback and refine these internal checklists, and then update application forms and online checklists to be consistent with the internal checklists; should also state that additional information may be requested as a result of detailed review of the specifics of an application
	Root Issue	Certain documents are commonly missed during the development permit application stage		
	Recommendation	Outline on the website and in the application process what documents are required for each type of development permit; improve or create internal checklists used by Clerks to assess completeness of development permit applications		
	Target Outcome	Applications are submitted with all required information, thereby reducing processing time and increasing customer satisfaction		
	Responsible	Community Development Planning		
	Timeline	Year 2		

Recommendations & Actions

Community Development Planning

Recommendation No. 65










Action Items

	Departmental Challenge	Forms and Checklists
	Root Issue	Minimal guidance is provided to permit applicants to assist them in filling out their application online
	Recommendation	Add links to checklists and include definitions within online applications
	Target Outcome	Increase the accuracy and completeness of submitted applications
	Responsible	Community Development Planning
	Timeline	Year 1

- Consult Clerks on which online application fields are commonly and incorrectly populated, and for which applications; use this information to create a prioritized list
- Work with IT to add a 'more information' question mark icon to these fields with a definition
- Alternatively, develop a glossary of common terms found on applications (as a PDF) that includes visuals and examples (e.g. how to calculate "lot coverage"), and post it to the website with a link to it from either inside the online application or placed at the top of the permit application pick-list as a general resource they can open in another tab prior to starting an application; note that the resource will help applicants populate their application correctly, thus reducing processing time
- Add an informational banner to the E-permitting webpage and a note at the top of each permit picklist (both for Planning/Engineering tab and the Building tab) that guides the applicant to not only contact P&D if they are unsure of which application to select, but also offers a link for them to book a pre-application meeting at no cost; consider embedding a tool such as Microsoft Bookings or Calendly and, if not possible, provide a simple request web form (online form) for the potential applicant to enter basic contact/case information
- When adding hyperlinks and more information, include references to specific sections of relevant legislation, as opposed to referring to the Bylaw or Safety Codes Act in its entirety
- Investigate the effort of IT adding a pop-up with a relevant checklist on certain applications (such as those frequently used by residents); if this will require too much configuration effort, consider adding a mandatory checkbox on these applications prior to submission that requires the applicant to acknowledge they have reviewed the relevant application checklist (either link to the Development Permit landing page or Building Permit landing page) and uploaded the required attachments needed by RMWB to process their application








Recommendations & Actions

Community Development Planning

Recommendation No. 66				Action Items
	Departmental Challenge	Organizational Design		<ul style="list-style-type: none">• The development permit process owner could review development permit types to clearly specify what the circulation period is for each (in alignment with legislation, past experience and performance targets); these entities could be consulted on circulation period to understand if it is realistic• These circulation periods can be advertised on the website under each development permit type, so applicants are aware of how long they can expect their application to be out for review by relevant stakeholders/entities as a step in the process• When Planners send these circulations through Accela and email, a standard practice of reminding stakeholders to provide their feedback 'x' days before the deadline could be implemented; if any deficiencies are identified in the application, a Planner could follow up with the applicant and advise them of any outstanding or insufficient information• Instead of Planners using discretion to extend circulation timeframes, it may be beneficial to implement a practice of requiring a written request from stakeholders to extend timelines (and the applicant being notified if the circulation timeframe is extended significantly)
	Root Issue	There is an over reliance on inter-department review cycles to progress application status within Community Development Planning		
	Recommendation	Review circulation periods by development permit type, adjusting where possible, and enforce them more strictly		
	Target Outcome	Fewer circulation period extensions, improved customer service (communication) and overall reduction in processing time		
	Responsible	Community Development Planning		
	Timeline	Year 1		








Recommendations & Actions

Community Development Planning

Recommendation No. 67				Action Items
	Departmental Challenge	Information Management		<ul style="list-style-type: none">Consider the procurement of an online tool that provides a geospatial view of land use districts; alternatively, investigate whether this functionality can be added to the existing Civic Insights tool
	Root Issue	The public is unable to access a geospatial view of land and property file data		
	Recommendation	Investigate whether additional functionality can be purchased or added to the existing Civic Insights online tool		
	Target Outcome	Relevant land and property information more readily accessible to staff and the public		
	Responsible	Community Development Planning		
	Timeline	Year 2		

Recommendations & Actions

Community Development Planning

Recommendation No. 68				Action Items
	Departmental Challenge	Information Management		<ul style="list-style-type: none">• If an editable version of the existing Land Use Bylaw does not exist, have a staff member spend a day converting the current PDF Bylaw file into a MS Word file and then incorporate the amendments into that master file, so they no longer reside in multiple separate PDFs on the website• Have Legal Services proof read the document for any errors or mistakes in bringing the content in (such as numbering inaccuracies) and post that document to the website while removing the old documents; note that no approvals would be needed, as no content will have changed
	Root Issue	Land Use Bylaw documentation is spread across multiple files making it difficult for the public to use		
	Recommendation	Consolidate the existing amendments into the current Land Use Bylaw while the new Bylaw moves through approvals		
	Target Outcome	Improve navigation and stakeholder understanding of the existing Land Use Bylaw (and its constituent amendments) until the new Land Use Bylaw is passed by the new Council		
	Responsible	Community Development Planning		
	Timeline	Year 2		

5.3








RECOMMENDATIONS AND ACTIONS

Safety Codes










Recommendations & Actions

Safety Codes

Recommendation No. 69				Action Items
	Departmental Challenge	Business Process		<p>Note: The purpose of this recommendation is to summarize proposed changes to the Occupancy Permit process; action items outlined below may correspond with additional root issues identified in this report.</p> <ul style="list-style-type: none">• Provide information on website explaining the purpose of an Occupancy Permit, when to apply and what information and other permits are required for granting occupancy• Remove or clarify the relevance of including "Homeowner's Permit" on the Occupancy Permit page of the website (this permit is also not listed under Building Permits tabs)• Increase internal understanding of conditional, partial and temporary Occupancy Permits, including how they are different, associated time frames, etc.; provide explanation of each permit type on the website• Based on leading practice research, discontinue offering "Fee for Service" inspections using the existing Occupancy Permit workflow; instead, offer this as a separate consultative process and workflow administered as a service under the Planning/Engineering tab of E-Permitting; both a planner and inspector would be involved to comment on Land Use Bylaw and Safety Codes considerations, respectively<ul style="list-style-type: none">• This would reduce liability to RMWB from positioning "Fee for Service" under Safety Codes where customers will seek advice on topics outside on an inspector's jurisdiction• Have Legal draft an agreement or terms which would be included on the consultation paperwork that highlights the limitations of the service and emphasises the key steps, requirements and potential for enforcement to occur if the applicant is to pursue a follow-on permit based on the results of this consultative service
	Root Issue	Unclear processes related to the Occupancy Permit process		
	Recommendation	Re-engineer the Occupancy Permit process		
	Target Outcome	Improve internal and external understanding of the Occupancy Permit process; increase internal efficiency by preventing further backlog of Occupancy Permits		
	Responsible	Safety Codes		
	Timeline	Year 2		

Recommendations & Actions

Safety Codes

Recommendation No. 70				Action Items	
	Departmental Challenge	Business Process			
	Root Issue	The occupancy permit process and workflow is being used to offer a consultation service			
	Recommendation	Offer a separate, standalone process (and workflow) whereby the public can apply (under the Planning tab in Accela) for a consultation with a Planner and Inspector pair who can advise (through an inspection and discussion) of the main considerations an applicant may want to consider under the Land Use Bylaw and Safety Codes Act		<ul style="list-style-type: none">Based on leading practice research, cease the practice of Safety Codes staff offering a “Fee for Service inspection” to the public where applicants can apply for an occupancy permit and get an inspection prior to a development permit and/or building permit being issuedInstead, offer this as a separate consultative process and workflow administered as a service under the Planning/Engineering tab of E-Permitting; both a planner and inspector would be involved to comment on Land Use Bylaw and Safety Codes considerations, respectivelyHave Legal draft an agreement or terms which would be included on the consultation paperwork that highlights the limitations of the service and emphasises the key steps, requirements and potential for enforcement to occur if the applicant is to pursue a follow-on permit based on the results of this consultative service	
	Target Outcome	Further increase customer satisfaction with this service, reduce liability to RMWB from positioning “Fee for Service” under Safety Codes where customers will seek advice on topics outside on an inspector's jurisdiction, and increase internal efficiency by preventing further backlog of Occupancy Permits.			
	Responsible	Safety Codes			
	Timeline	Year 2			

Recommendations & Actions

Safety Codes

Recommendation No. 71



Action Items

	Departmental Challenge	Policy
	Root Issue	Occupancy permit policy directives are not universally understood
	Recommendation	Formalize management's guidance on Occupancy Permits
	Target Outcome	Improve internal and external understanding of the Occupancy Permit process
	Responsible	Safety Codes
	Timeline	Year 1

- Using the Occupancy Permit process maps as a guide and ensuring alignment with relevant legislation, bylaws and administrative directives, develop a new, written management guidance for the Occupancy Permit process
- Leverage information and references to the Safety Codes Act from the guidance document initially developed by the Safety Codes Branch, such as definitions of the different types of occupancy permit types (partial, conditional and full) and the purpose of each of these services
- Hold a discussion with management and key roles involved in the process to address any points of confusion about how Occupancy Permits will be handled going forward, continuing to ensure alignment with the future state process design recommendations
- Communicate these changes using the process outlined in the Continuous Improvement Plan, and ensure any future changes to this procedure undergo a controlled change (versioning and approval) process
- Provide information on the website explaining the purpose of an Occupancy Permit, when to apply, and any additional information required for granting occupancy (e.g. other permits required)
- Remove or clarify the relevance of including a "Homeowner's Permit" on the Occupancy Permit page of the website (this permit is also not listed under Building Permits tabs)
- Increase internal understanding of conditional, partial and temporary Occupancy Permits, including how they are different, associated time frames, etc.; provide explanation of each permit type on the website

Recommendations & Actions

Safety Codes

Recommendation No. 72



	Departmental Challenge	External Communications
	Root Issue	The process for a Building Permit (General) is not universally understood
	Recommendation	Add a purpose description to the Building Permits web page
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Safety Codes
	Timeline	Year 1
	Checklist Currently Exists?	Yes

Action Items

- Consider adding a purpose description to the [Building Permits](#) web page (e.g. To ensure that the structure will perform as it should to keep occupants safe)
- While a checklist currently exists for each of the individual types of building permits (being Accessory Structure, Basement Development, Basement Suite, Deck, Single Family Dwelling and Commercial), there may be value in the following:
 - Clearly define the term “Accessory Structure” on the corresponding checklist
 - Add a description to the Building Permits web page that clearly differentiates a basement development from a basement suite
- Consider embedding a link to the [Safety Codes Permitting fee schedule](#) within each application form
- Consider making the Safety Codes Permitting fee schedule more intuitive by reducing the length (it is currently 10 pages long)

Recommendations & Actions

Safety Codes

Recommendation No. 73











	Departmental Challenge	External Communications
	Root Issue	The process for a Declaration of “Homeowner” for Permit is not universally understood
	Recommendation	Add a purpose description to the Declaration of “Homeowner” for Permit Under the Safety Codes Act form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Safety Codes
	Timeline	Year 1
	Checklist Currently Exists?	No

Action Items

- Consider adding a purpose description to the [Declaration of “Homeowner” for Permit Under the Safety Codes Act](#) form (e.g. For trade specific permits, the homeowner can declare their own competency to perform work on their own building, gas, electrical or sewage systems)
- Consider adding the following information to the application form: a description of the form, when an applicant is required to apply, the application process (including the process following submission), and any applicable fees
- Consider adding submission instructions to the form, including that the permit should be submitted with the building inspection permit









Recommendations & Actions

Safety Codes

Recommendation No. 74				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Electrical Permit Application form (e.g. Electrical permits are needed to install, alter or add to any electrical systems)Consider adding the following information to the application form: the application process (including the process following submission) and any applicable feesConsider adding a description that clearly differentiates an electrical permit from an annual electrical permit application	
	Root Issue	The process for a Electrical Permit is not universally understood			
	Recommendation	Add a purpose description to the Electrical Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Safety Codes

Recommendation No. 75				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Annual Electrical Permit Application form (e.g. Electrical permits are needed to install, alter or add to any electrical systems)Consider adding the following information to the application form: when an applicant is required to apply, the application process (including the process following submission), and any applicable feesConsider adding a description that clearly differentiates an electrical permit from an annual electrical permit application	
	Root Issue	The process for an Annual Electrical Permit is not universally understood			
	Recommendation	Add a purpose description to the Annual Electrical Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Safety Codes

Recommendation No. 76











Action Items

	Departmental Challenge	External Communications
	Root Issue	The process for an Occupancy Permit is not universally understood
	Recommendation	Add a purpose description to the Occupancy Permit Application form
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Safety Codes
	Timeline	Year 1
	Checklist Currently Exists?	No

- Consider adding a purpose description to the [Occupancy Permit Application](#) form (e.g. Occupancy permits are used to ensure the structure will perform as it should to keep occupants safe)
- As the purpose description for Building Permits is the same as the purpose description for Occupancy Permits, consider adding a description that clearly differentiates between the two permit types
- Also consider creating a checklist that applicants can use to determine whether an Occupancy Permit is required
- Identify and outline who is responsible for completing the Regional Municipality of Wood Buffalo section of the Occupancy Permit Application
- There may be value in adding a description for the various types of occupancy permits (conditional, partial, temporary and full) to a standalone Occupancy Permit web page
- There may also be value in explaining the “Fee for Service” (pre-occupancy)
- Consider adding the application process (including the process following submission) to the application form









Recommendations & Actions

Safety Codes

Recommendation No. 77				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Gas Permit Application form (e.g. Gas permits are needed to install, alter or add to any gas systems)Consider adding the application process (including the process following submission) and any applicable fees to the application form	
	Root Issue	The process for a Gas Permit is not universally understood			
	Recommendation	Add a purpose description to the Gas Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	No			









Recommendations & Actions

Safety Codes

Recommendation No. 78				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Gas Appliance Venting Permit Application form (e.g. A ventilation permit is required when gas appliances are being installed)Consider adding the application process (including the process following submission) and any applicable fees to the application formConsider moving the checklist for the HVAC System replacement from here to the page where the gas permit application is found	
	Root Issue	The process for a Ventilation Permit is not universally understood			
	Recommendation	Add a purpose description to the Gas Appliance Venting Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	Yes			









Recommendations & Actions

Safety Codes

Recommendation No. 79				Action Items
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Private Sewage Disposal Permit Application form (e.g. A private sewage permit is required when work is being done around sewage systems)Consider adding the application process (including the process following submission) to the application formConsider adding a link to the Private Sewage Codes and Standards page of the Alberta Municipal Affairs website on the application form for applicants to view ticket holder names and contact information
	Root Issue	The process for a Private Sewage Permit is not universally understood		
	Recommendation	Add a purpose description to the Private Sewage Disposal Permit Application form		
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used		
	Responsible	Safety Codes		
	Timeline	Year 1		
	Checklist Currently Exists?	No		









Recommendations & Actions

Safety Codes

Recommendation No. 80				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Inspection Requests web page (e.g. An online tool used by permit holders to submit a request for an inspection)	
	Root Issue	The process for a inspection booking requests is not universally understood			
	Recommendation	Add a purpose description to the Inspection Requests web page			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	N/A			









Recommendations & Actions

Safety Codes

Recommendation No. 81				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the UGS Connection/Disconnection Permit Application form (e.g. Seek approval to connect or disconnect a water line, sanitary sewer line or a storm sewer line)Consider adding the following information to the application form: when an applicant is required to apply, the application process (including the process following submission), and any applicable feesAdd a step in the outlined process around it being the owners responsibility to work with the utility companies directly to acquire a meter (this missed step results in many owners failing to complete this action and consequentially experiencing delays without access to utilities)	
	Root Issue	The process for a UGS Connection/Disconnection Permit is not universally understood			
	Recommendation	Add a purpose description to the UGS Connection/Disconnection Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	No			









Recommendations & Actions

Safety Codes

Recommendation No. 82				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none"> Consider adding a purpose description to the Plumbing Permit Application form (e.g. Plumbing permits are needed to install, renew or change to any plumbing equipment or plumbing systems) Consider adding the application process (including the process following submission) to the application form 	
	Root Issue	The process for a Plumbing Permit is not universally understood			
	Recommendation	Add a purpose description to the Plumbing Permit Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Safety Codes

Recommendation No. 83				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Sump Pump to Sanitary Connection Application form (e.g. A request that applicants can use to connect their sump pump to the municipal plumbing system)Consider adding information around when the applicant is required to apply to the application form	
	Root Issue	The process for Sump Pump to Sanitary Connection is not universally understood			
	Recommendation	Add a purpose description to the Sump Pump to Sanitary Connection Application form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Safety Codes			
	Timeline	Year 1			
	Checklist Currently Exists?	Yes			

5.4

RECOMMENDATIONS AND ACTIONS

Land Administration



Recommendations & Actions

Land Administration

Recommendation No. 84










Action Items

	Departmental Challenge	Business Process
	Root Issue	Access to municipal land by residents is not proactively managed and enforced
	Recommendation	Increase public awareness of municipally owned land to discourage misuse. Create a mechanism for notifying P&D of misuse/damage
	Target Outcome	Reduction in municipal land misuse/damage and an identified point of contact within P&D who is responsible for coordinating due-diligence and enforcement; improved operational efficiency
	Responsible	Land Administration
	Timeline	Year 2

- Increase internal understanding of what encroachment agreements are and administer agreements more judicially and consistently
- On the webpage that discusses fencing and encroachments [here](#), add information on how a resident can request temporary use or access to municipal land (i.e. by contacting Land Administration); also provide guidance on how a resident can find out (for themselves) whether land is municipal or privately owned (via maps)
- Guide Public Works to place permanent signs in locations where municipal property is frequently damaged and repaired; include enforcement information and/or contact information for Land Administration on the sign
- Whomever is assigned within P&D as process owner for enforcement processes would be the point of contact to be notified by other departments who identify scenarios of land misuse and damage, and who would then work within P&D to confirm the land is municipal land, that there is no existing land agreement (e.g. such as an encroachment, license of occupation, temporary workspace agreement, etc.) in place, and then confirm with a Planner in CDP that no approved variance exists in relation to the location of the issue
- After this confirmation process, the process owner will request a Development Compliance Officer inspect the site, who will then made a decision as to whether to issue a warning or fine for example
- This information will be tracked internally by the enforcement process owner, including the outcome of enforcement through follow up measures

Recommendations & Actions

Land Administration

Recommendation No. 85				Action Items
	Departmental Challenge	Business Process		<p>Note: The purpose of this recommendation is to summarize proposed changes to the Land Sales process; action items outlined below may correspond with additional root issues identified in this report.</p> <ul style="list-style-type: none">• Create a standard form for a land request clearly outlining the minimum information required for a potential purchaser to submit a request• When a request to purchase land is received, add a process step to perform a conflict-of-interest check between the applicant and the Land Management Specialist, Land Administration Manager and other RMWB employees as deemed appropriate (process step to be designed and administered with advice and support from Legal Services)• If a request to purchase is considered by the Land Management Specialist to not be "applicable" for reasons other than straightforward zoning, add a process step for management review and approval• Add more clarity to the Circulation Notice process regarding reminder notifications, extensions for review, etc.• Create/update the standard agreement used for Land Sales transactions
	Root Issue	Unclear processes related to the Land Sales process		
	Recommendation	Re-engineer the Land Sales process		
	Target Outcome	Address a public perception that the land sales process could be influenced by a "who you know" bias; increase process transparency and consistency		
	Responsible	Land Administration		
	Timeline	Year 1		

Recommendations & Actions

Land Administration

Recommendation No. 86










Action Items

	Departmental Challenge	Business Process
	Root Issue	Third-party agreement terms in Land Administration processes are not consistently discussed upfront and responsibilities clearly assigned
	Recommendation	In third-party agreements, ensure impacted departments are notified prior to contract execution
	Target Outcome	Ensure agreement terms can be met and responsibilities for doing so are clear and understood, reduced cost to RMWB in delivering on contract terms, and improved perceptions of RMWB service delivery
	Responsible	Land Administration
	Timeline	Year 2

- Add a second and final contract review step in select Land Administration processes that specify RMWB service obligations that extend outside of standard terms and conditions written by Legal
- Where a concern arises from an internal RMWB stakeholder or department regarding their ability to fulfill a specific term of an agreement, do not execute the agreement until it is resolved
- Ensure this process of broad contract review also occurs before an agreement is renewed, so any active contracts with terms not sustainable or supported by all internal stakeholders is addressed
- Review the following processes to ensure adequate internal consultation occurs both upfront in the process and once agreement terms are drafted
 - 1.3.1 Administer Encroachment Agreements
 - 1.3.2 Administer Lease Agreements (RMWB as Landlord)
 - 1.3.4 Administer License of Occupation Agreements
 - 1.3.5 Administer Road Use Agreements
 - 1.3.6 Administer Crossing Agreements
 - 1.3.9 Administer Right of Way and Easement Agreements
 - 1.3.14 Administer Temporary Workspace Agreements)








Recommendations & Actions

Land Administration

Recommendation No. 87				Action Items	
	Departmental Challenge	Policy		<ul style="list-style-type: none">• Review current internal policies regarding RMWB tenancy and landlord agreements• Give consideration to alternative options	
	Root Issue	A high volume of resource effort goes into managing RMWB tenancy agreements			
	Recommendation	Consider developing an internal policy for the appropriateness of and criteria for the RMWB being a "permanent" or long-term landlord			
	Target Outcome	Reduce risk and uncertainty of long-term obligations to RMWB			
	Responsible	Land Administration			
	Timeline	Year 1			









Recommendations & Actions

Land Administration

Recommendation No. 88				Action Items	
	Departmental Challenge	Policy		<ul style="list-style-type: none">• Consolidate expired encroachments agreements• Consider identifying criteria for assessing whether or not outstanding fees need to be paid• Evaluate on a case by case basis whether or not the outstanding fees need to be repaid• Send notice to agreement holder	
	Root Issue	Some agreements (e.g. encroachment agreements) are found to have expired with several years of renewal fees due			
	Recommendation	On a case by case basis, evaluate whether or not the outstanding fees need to be paid for any expired encroachment agreements			
	Target Outcome	Where deemed appropriate, outstanding fees are collected			
	Responsible	Land Administration			
	Timeline	Year 1			

Recommendations & Actions

Land Administration

Recommendation No. 89				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none">Consider adding a purpose description to the Authorization for Municipal Land form (e.g. Seek approval to use or conduct development or building activities on municipal land)Consider adding the following information to the application form: a description of the authorization form, when an applicant is required to apply, the application process (including the process following submission), and any applicable feesIncrease the space available for an applicant to draft the purpose of their application (there is presently a single line to describe the purpose of the form usage)	
	Root Issue	The application process for an Authorization for Municipal Land is not universally understood			
	Recommendation	Add a purpose description to the Authorization for Municipal Land form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Land Administration			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Land Administration

Recommendation No. 90











	Departmental Challenge	External Communications
	Root Issue	The processes for the Land Administration agreements are not universally understood
	Recommendation	Add purpose descriptions for the following services to the RMWB website: Crossing Agreement, Easement Agreement, Encroachment Agreement, Road Use Agreement, Road Closure Agreement, Third-party Land Consent Agreement, Land Purchase Agreement, Land Sales Agreement, Letter of Authorization and License of Occupation
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used
	Responsible	Land Administration
	Timeline	Year 1
	Checklist Currently Exists?	No

Action Items

- Consider adding a purpose description for the following services to the RMWB website: Crossing Agreement, Easement Agreement, Encroachment Agreement, Road Use Agreement, Road Closure Agreement, Third-party Land Consent Agreement, Land Purchase Agreement, Land Sales Agreement, Letter of Authorization and License of Occupation (e.g. The purpose of the Land Administration team's services are to help purchase, sell or manage land owned by the municipality)
- With support from the Legal department, assess which services under Land Administration should be listed on the website








Recommendations & Actions

Land Administration

Recommendation No. 91				Action Items	
	Departmental Challenge	External Communications		<ul style="list-style-type: none"> Consider adding a purpose description to the Discharge of Caveat Request Form (e.g. Request a caveat to be discharged from the parcel of land) Consider adding the following information to the application form: when an applicant is required to apply and the application process (including the process following submission) Relocate this application form from the Community Development Planning permitting web page to a proposed Land Administration services web page 	
	Root Issue	The process for a Discharge of Caveat Request is not universally understood			
	Recommendation	Add a purpose description to the Discharge of Caveat Request Form			
	Target Outcome	Improves the reader's understanding of what, how and why the application form is being used			
	Responsible	Land Administration			
	Timeline	Year 1			
	Checklist Currently Exists?	No			

Recommendations & Actions

Land Administration

Recommendation No. 92				Action Items
	Departmental Challenge	Forms and Checklists		<ul style="list-style-type: none">• Work with Legal to create standard templates and boilerplate agreements that can be modified on a case-by-case basis, focusing on higher risk agreements to include:<ul style="list-style-type: none">• Operating/Service Agreements• License of Occupation Agreements• Lease Agreements• Temporary Workspace Agreements• Land Sales• Within standard templates, include verbiage that clearly identifies the individual responsible for specific terms listed within the agreement, especially land reclamation responsibilities when applicable• For higher risk practices, such as evaluating land acquisition and disposition requests, implement a standard practice of performing a conflict check (to protect RMWB against liability and neutralize any perceptions of impartiality/preferential relationships that may exist)• Also in relation to this process, implement a land purchase request/inquiry form, documenting when the request is accepted and denied, and providing those requests to Legal Services for filing
	Root Issue	Various business processes lack standardized practices and agreements		
	Recommendation	Develop and implement standardized practices and agreements for high-risk Land Administration activities		
	Target Outcome	Reduction in liability and contract/service-delivery burden to the RMWB		
	Responsible	Land Administration		
	Timeline	Year 2		

6.

IMPLEMENTATION PLAN



Implementation Plan

To help guide prioritization and sequencing

	Year 1							Year 2							Year 3					
P&D Director's Office	1	3	4	7	8	10	11	2	5	6	9	16	17	20	21	13	23	24	27	30
	12	14	15	18	19	25	28	22	26	29	32									
	31																			
Community Development Planning	34	35	41	46	47	48	49	33	36	39	40	42	44	64	67	37	38	43	45	
	50	51	52	53	54	55	56	68												
	57	58	59	60	61	62	63													
	65	66																		
Safety Codes	71	72	73	74	75	76	77	69	70											
	78	79	80	81	82	83														
Land Administration	85	87	88	89	90	91		84	86	92										

Approach: Implementation Plan & Detailed Branch Project Plans

- Implementation will start immediately and will occur over the next 3 years.
- Responsibilities and actions have been assigned to one of the following:
 - Planning & Development Director's Office
 - Community Development Planning
 - Safety Codes
 - Land Administration
- Each Branch will create a specific project plan to address the recommendations and actions through a detailed project plan
- The detailed project plans which has been created will include additional context for consideration, further clarity on team member assignments and responsibilities within each branch, Priority (Low, Medium, High), expected delivery date and its current status.
- This will help ensure more effective project management to further enable coordination, monitoring, controlling, and tracking of action items.



Key Considerations: Risks, Dependencies, Constraints, Success Factors

When building the implementation plan, the following points were taken into consideration

Risks

Risk: An uncertain event that may or may not occur during a project but that could impact the ability to meet goals and /or KPI's

- Natural Disaster
- Turnover amongst staff (Continuity)
- Staff buy-in
- Budget approval (i.e. Accella)
- Resourcing (Assumption – that it will be maintained at its current levels)
- Volume of change
- Managing key stakeholder relationships – Aren't continued / interrupted
- Resistance to change
- Ability of staff to remain working in an office environment
- Relaxation of COVID-19 measures

Dependencies

Dependency: An external project or program that may impact execution when the completion of one is reliant on the completion or initiation of another

- IT
 - E-permitting website
 - SAP Upgrades
 - CRM Project
- Communications and Engagement
 - PULSE
- Legal – Coordination
- Research and Information Management Project (OpenText, Property Files)
- In-house training group

Constraints

Constraint: Any limitation or risk that must be accounted for over the duration of the project life cycle

- In-house training group
- Capacity to implement change / Recruitment has been challenging / could be slowed down
- Elevated expectations (always committed to improvement). The expectations are out there.

Success Factors

Success Factors: An element that is necessary for an organization or project to achieve its mission.

- Managing key stakeholder relationships
- Staff on board with support of the plan
- People are bought in and feel it's important

6.1

IMPLEMENTATION PLAN

Continuous Improvement





Continuous Improvement is the on-going drive to improve services, processes and capability through incremental and sustainable initiatives.

It focuses on **eliminating waste, delivering value to the customer**, and creating an **organizational culture** that promotes improvement activities as part of day-to-day operations.



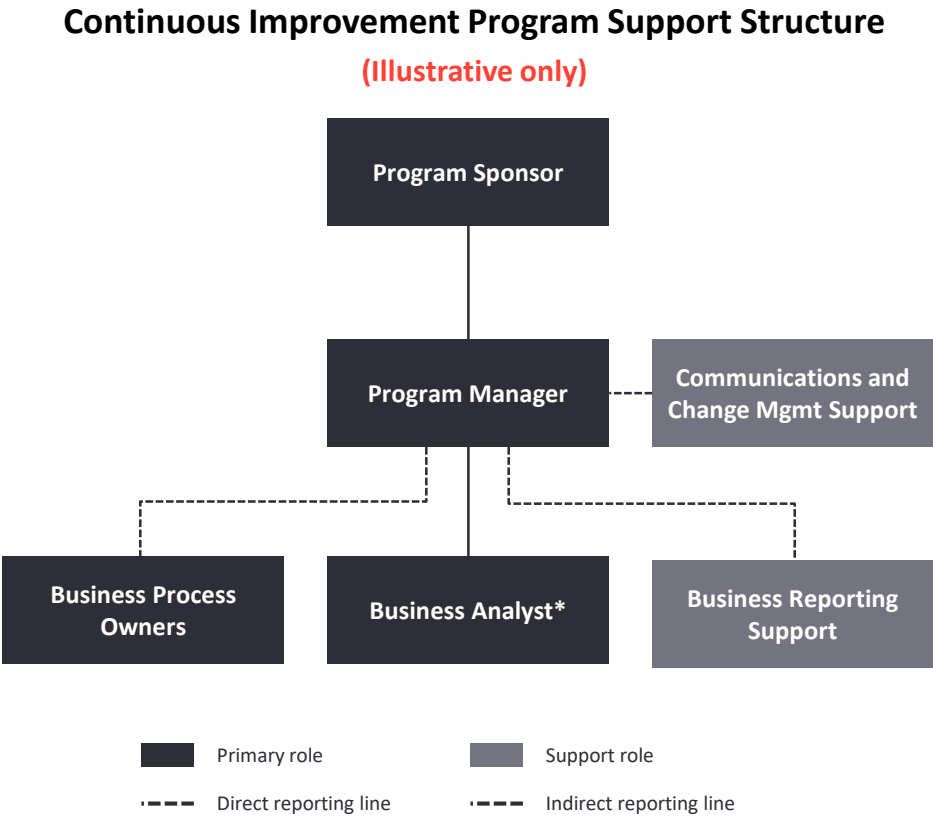
Steps to putting your continuous improvement plan in motion

Below are the six key steps summarizing how P&D can move forward to implement process recommendations over time

- 1** Affirm with the P&D leadership team what the primary 2-4 (max) business goals are (See section 3 for additional detail)
- 2** Identify a realistic set of KPIs that tie to those business goals and will be used to report (internally and/or externally) how the continuous improvement effort is progressing over time
- 3** Establish baseline values to measure current performance of each measure
- 4** Create resource capacity to drive implementation of report recommendations and ongoing performance improvement projects, considering the key roles required
- 5** Manage the process of making changes and log those changes and impacts (especially any fluctuations in performance measure values), so they can be reported on to P&D stakeholders. Continue to drive cultural mindset shift asking questions such as “does this work?” and “how can we make it better?”
- 6** Celebrate progress and success made in implementing recommendations – big or small – and recognize individuals for their contributions to helping P&D achieve its business goals

Roles and responsibilities required for effective continuous improvement

Dedicated resources provide the capacity needed to manage the execution of recommendations, yet few would be needed for full time hours



Key Role	Key Responsibilities	Estimated Average Effort
Program Sponsor	<ul style="list-style-type: none">Actively advocate for continuous improvement projects and advise of prioritizationAllocate resources and ensure team capacityTake ownership of results and present progress to SLT, DAC and CouncilRemove barriers and resolve escalated issues	1 hr / week
Program Manager	<ul style="list-style-type: none">Oversee the overall execution of the programOversee and facilitate communications and change management supportLead implementation of improvement projectsManage, monitor and track progress of projectsAct as the point of intake for improvement ideasWork with stakeholders to define, scope, prioritize, resource and track projectsEnsure Process Owners have the tools they needObtain and review performance measure reports	40 hrs / week
Business Analyst	<ul style="list-style-type: none">Support analysis and execution of continuous improvement projects	Variable
Business Process Owners	<ul style="list-style-type: none">Share knowledge of their assigned process(s)Identify and advise of process changes/exceptionsEnsure process documentation remains up-to-date	Variable

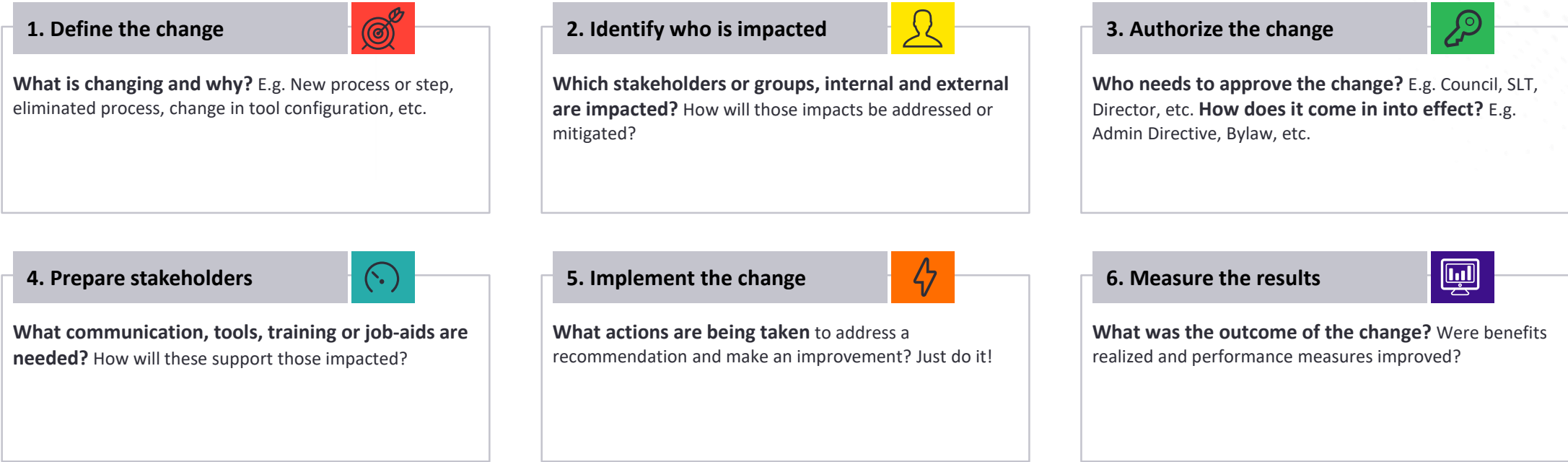
This support structure (within P&D) would provide leadership, skills and capacity required to deliver on the recommendations of the report and future continuous improvement projects as they are identified, evaluated and approved for execution.

Process of managing change

An important part of any continuous improvement effort is the establishment of a predicable, step-wise process of managing changes

As observed and documented, there is an opportunity within P&D to establish a formal change process that will ensure new processes, practices and tools are fully and properly implemented.

For each change (i.e. report recommendation or continuous improvement project) to be implemented:



These simple steps can be followed when implementing big or small process improvement changes, and will increase the likelihood a change will “stick” and benefits are realized. This information can be captured in a basic Change Log.

7.

APPENDICES

Process Maps – Inventory Listing

- EY compiled an inventory of customer-facing business processes involving permitting, licensing, and land administration
- A step-by-step process flow or “process map” was documented for each of the below 29 processes based on a review of available internal and external documentation, process walkthroughs with branch managers and engagement with P&D staff and supervisors

Process Inventory

Community Development Planning (CDP)

- ★ 1.1.1 Administer Development Permits
- 1.1.2 Administer Special Event Bookings (On Municipal Land)
- 1.1.3 Administer Sign Bookings (on Municipal Land)
- 1.1.4 Administer Land Use Bylaw Amendments
- 1.1.5 Administer Compliance Certificates
- 1.1.6 Conduct Property File Searches
- ★ 1.1.7 Administer Business Licenses
- 1.1.8 Administer Variance Applications
- 1.1.9 Administer Subdivision Applications
- 1.1.10 Administer Zoning Certificates

Safety Codes (SC)

- 1.2.1 Administer Building Permits
- 1.2.2 Administer Trades-specific Permits
- 1.2.3 Perform Inspections
- ★ 1.2.4 Administer Occupancy Permits
- 1.2.5 Report Residential Water Billing Permit Closures

Land Administration (LA)

- 1.3.1 Administer Encroachment Agreements
- 1.3.2 Administer Lease Agreements (RMWB as Landlord)
- 1.3.3 Administer Lessee - Environment & Parks (AEP) Dispositions
- 1.3.4 Administer License of Occupation Agreements
- 1.3.5 Administer Road Use Agreements
- 1.3.6 Administer Crossing Agreements
- 1.3.7 Administer Land Acquisitions
- ★ 1.3.8 Administer Land Sales
- 1.3.9 Administer Right of Way and Easement Agreements
- 1.3.10 Administer Road Closures
- 1.3.11 Administer Third-party Land Consents
- 1.3.12 Administer Reserve Designation Removals
- 1.3.13 Issue Letters of Authorization
- 1.3.14 Administer Temporary Workspace Agreements

EY recommends four processes be re-engineered (denoted by a ★) and several other processes be revised to be more streamlined, efficient and consistent with the department’s desire to provide a better customer experience.